# 全球茶情报告

# World Tea Industry Review

（2022.5）

全球茶情报告 World Tea Industry Review

第五届国际（宜宾）茶业年会组委会编

Edited by the 5th Annual International Tea Conference Organizing Committee

# 全球茶情报告

# World Tea Industry Review

（2022.5）

第五届国际（宜宾）茶业年会组委会编
Edited by the 5th Annual International Tea Conference Organizing Committee

# 全球茶情报告
# World Tea Industry Review
（2022.5）




编委会地址 Address of Editorial Committee: 北京市东城区广渠门内大街 80 号通正国际大厦 4 层
4th Floor, Talent International Building, No.80 Guangqumennei Street, Dongcheng District, Beijing,China.

联系电话 Tel: 010-87109865
010-87109865

编辑部地址 Address of Editing: 杭州和厚堂文化创意有限公司 浙江省杭州市江干区采荷路 41 号 1307-1308
Hangzhou Hehoutang Cultural Creativity Co., Ltd. 1307-1308, No. 41, Caihe Road, Jianggan District, Hangzhou, Zhejiang,China.

联系方式 Tel: 0571-87552942
0571-87552942

## 编委单位
## Chief Editorial Units

中国食品土畜进出口商会
China Chamber of Commerce of Import and Export of Foodstuffs, Native Produce and Animal By-Products（CFNA)

联合国粮农组织政府间茶叶工作组
FAO Intergovernmental Group (IGG) on Tea

中国茶叶学会
China Tea Science Society

国际茶叶委员会
International Tea Committee

## 主编单位
## Editorial Units

中国食品土畜进出口商会茶叶专业委员会
Tea Committee of CFNA

宜宾市农业农村局
Yibin City Agricultural and Rural Bureau

宜宾市茶产业研究院
Yibin Academy of Tea Industry

杭州和厚堂文化创意有限公司
Hangzhou Hehoutang Cultural Creativity Co., Ltd.

## 致谢单位
## Acknowledgment

美国茶叶协会
Tea Association of the USA

英国茶叶与花草茶协会
United Kingdom Tea & Infusions Association (UKTIA)

斯里兰卡卢哈纳大学农学院
Faculty of Agriculture, University of Ruhuna, Sri Lanka

俄罗斯茶与咖啡生产者协会
Russian Association of Tea & Coffee Producers

马来西亚茶业商会
Malaysia Tea Association

加拿大茶叶与花草茶协会
Tea and Herbal Association of Canada

欧洲特种茶协会
European Speciality Tea Association

印度尼西亚茶叶局
Indonesia Tea Board

法国 Nouvelle Presse du The 杂志
Nouvelle Presse du The

泰国茶会
Tea and Chinese Cultural Appreciation Society of Thailand

意大利 Protea 培训学院
Italy Protea Academy

澳大利亚茶文化研究会
Australian Tea Cultural Society

韩国济州岛国际茶艺师学校
International Teaics School in Jeju

土耳其里泽商品交易所
Rize Commodity Exchange

尼泊尔茶叶协会
Nepal Tea Association

越南茶叶协会
Vietnam Tea Association

日本中国茶协会
Chinese Tea Association of Japan

茗边头条
Mingbian Headline News

# 目 录

# 序

**于 露｜中国食品土畜进出口商会副会长**

时光荏苒，岁月如梭。转眼间，国际（宜宾）茶业年会已历经五个年头，成功举办了四届。年会不仅成为全球茶界信息共享、交流合作、互利共赢的高端平台，也是展示中国茶产业、茶文化、茶科技的重要窗口，受到全球茶人的广泛关注。

过去两年间，虽然疫情阻挡了国外茶界同仁来宜宾的脚步，但是国际茶业年会倍受大家关注，热度不减。我们以线上方式多次相聚宜宾，大家互致问候，共享信息，交流疫情形势下茶叶生产、贸易和消费的最新动态，聚焦行业面临的挑战与机遇，提出可持续发展的新方向。每次线上相聚我都深深感受到全球茶叶大家庭的温暖、团结与信心。

在大家的共同努力下，《全球茶情报告》已成功发布了四册，每一册都是国际茶人智慧的结晶，汇集了最新的业态资讯与理论观点，深度洞察和剖析行业发展现状及趋势，为全球从业人员和茶叶爱好者提供了指导与借鉴，时效性、专业性和前瞻性倍受业界好评。

今年的《全球茶情报告》继续收录疫情发生以来各主要茶叶生产、消费国家和地区的最新形势，以及面对新的挑战与机遇采取的一些应对举措。我们希望新一期报告为大家把脉后疫情时代茶产业发展提供更多参考和支撑，继往开来，更好地服务于全球茶行业！





# Preface

**Yu Lu ｜ Vice President,China Chamber of Commerce of Import and Export of Foodstuffs, Native Produce and Animal By-Products(CFNA)**

Time slips through fingers without you knowing and the Annual International Tea Conference has been held for four times. It has now become a well-known international platform where tea communities around the world share information and conduct exchanges and cooperation for win-win outcome, and an important window of presenting the world with China's tea industry, tea culture and tea science and technology.

Although the pandemic has prevented us from gathering in Yibin over the past two years, the Conference is continuing getting attention from people around the world. In order to bring people together in Yibin again, we have turned to organize virtual meetings where we send greetings to each other, share tea information and latest trends on tea production, trade and consumption amid the pandemic, discuss the opportunities and challenges ahead, and brainstorm for sustainable growth. And each virtual gathering captures the solidarity, confidence and warmth of global tea family.

Thanks to the authors' contributions, four Global Tea Industry Reviews have been released. Each of them is the brainchild of the contributors and contains latest tea information, forward-looking views, and professional analysis of the state and trends of the tea industry in their respective countries, offering valuable guidance and experience to those engaged in this industry and tea lovers.

As usual, the Review for 2021 contains the latest trends of main tea producers and consumers and their countermeasures when facing new opportunities and challenges. Hopefully, it will serve the global tea industry better by providing people in the industry with some guides and reference points when they're navigating through the post-covid world.

WORLD

全球



**伊恩 . 吉布斯**

2016 年 5 月，伊恩 . 吉布斯当选国际茶叶委员会（ITC）主席。毕业后，伊恩在英国军队服役 14 年，曾到过伯利兹和柏林，也在澳大利亚和肯尼亚待过一小段时间。1990 年，伊恩与茶叶经济人威尔森 . 史密谢特一同进入伦敦的茶叶贸易行，并于 2005 年拥有了自己的公司。2009 年，伊恩代表马拉维加入国际茶叶委员会的管理董事会，于 2010 年当选董事会副主席。作为伦敦董事学会的成员，伊恩于 2017 年获得英国开放大学荣誉文学学士学位，主修法语和国际关系。

# 2021 全球茶叶贸易回顾

从 2020 年至今，疫情仍在继续影响着我们生活的方方面面，和大多数其他行业一样，我们面临着封锁、港口暂时关闭、出口集装箱短缺、运输成本不断攀升等众多挑战。供应链滞后和成本的急剧增加无疑对茶叶贸易带来巨大影响，批发商不得不检查其库存水平并提高价格。

2022 年以来，有迹象表明疫情在逐步得到缓解，尽管我们会继续受到它的影响，但希望今年和之后受到的影响会不断减小。此外，大部分行业都受到乌克兰局势的影响，特别是与第二大茶叶进口国俄罗斯、乌克兰和白俄罗斯进行贸易的出口商和批发商。然而，在茶叶出口国的不懈努力下，茶叶行业在过去成功地经受住了这种挑战。

2021 年全球茶叶产量似乎比 2020 年高出约 3%，印度 CTC 红碎茶供应增加，中国和斯里兰卡的传统红茶产量增加，以及中国绿茶和其他茶类的持续增长。中国占近一半的全球茶叶产量。印度茶叶产量在 2021 年全年增长了 6%，但由于天气不稳定，降雨量增加和干旱时间长，总产量仍低于 2019 年。

肯尼亚是茶叶出口量最多的国家，但 2021 年其产量不如 2020 年高，2020 年肯尼亚茶产量达到创纪录的 5.69 亿公斤。不过肯尼亚 2021 年 5.38 亿公斤的年总产量比 2019 年高出 16%。与中国一样，到去年年底，生产商似乎仍持有这部分增加的产量。

斯里兰卡的产量恢复到了 2019 的年水平。政府禁止进口化肥和杀虫剂的政策持续了快一年，全球茶叶行业在密切关注这些动态的同时，也担忧今后对茶叶质量和数量的影响。

据了解，2021 年，土耳其、越南、印度尼西亚茶产量保持稳定。尽管到 2021 年底，阿根廷遭受了异常热浪的侵袭，茶叶生产受到影响，但茶叶产量总体保持稳定。

2021 年，全球茶叶出口量达到 18.9 亿公斤，比

2020 年增长 3%（4.6 亿公斤），但仍低于 2019 年疫情前的出口量。最终数据尚未公布，肯尼亚出口量预计将占全球茶叶出口总量的 30%。其他主要出口国包括中国、斯里兰卡、印度、越南和阿根廷。出口总量占总产量的百分比继续下降，2021 年为 29%。

2021 年，肯尼亚茶叶出口量达到创纪录的 5.59 亿公斤，这包括在蒙巴萨拍卖会上出售的其他东非产地的茶叶。巴基斯坦是世界上最大的茶叶进口国，占这一数量的近 40%。从肯尼亚大量进口茶叶的其他国家有埃及、英国、俄罗斯联邦、阿联酋、苏丹、哈萨克斯坦、也门和波兰。

中国的主要市场是摩洛哥（以及其他北非和西非国家）、乌兹别克斯坦、俄罗斯联邦和中国香港。伊拉克、土耳其、阿联酋、俄罗斯联邦、伊朗、中国、利比亚和阿塞拜疆是斯里兰卡的主要出口市场。此外，据了解，由于汇率的不切实际，茶叶出口商正面临诸多与之相关的不稳定因素。

对俄罗斯联邦、伊朗、阿联酋和美国茶叶出口量的增长带动了印度整体的茶叶出口。然而，印度出口总量较低，这是因为印度国内消费在不断增长（健康的价格水平），而东非的茶叶相对便宜，运到伊朗又困难重重。

印度拍卖中心的价格没有 2020 年那么强劲，但高于 2019 年的水平。蒙巴萨 KTDA 茶叶的储备（底价）价格最初影响了拍卖中的需求，但在 2021 年最后三个月，价格水平上升，销售量上涨，而且这些价格水平一直持续到 2022 年。在斯里兰卡，由于卢比贬值等因素，拍卖价格保持健康。

随着一些国家逐渐解除其疫情防控限制，酒店、餐馆、咖啡馆等场所重新开放，那些在疫情高峰期间消费下降的国家实现了健康的复苏。这种现象在家庭饮茶文化并不盛行，而且在疫情期间总消费量仍然停滞不前或下降的国家中更为明显。由于疫情而导致家庭消费增长的其他市场中，这种上涨趋势有望通过直接从原产地或从特色茶叶店的在线销售渠道来得到维持。

尽管全球茶叶行业面临诸多挑战，但 2021 年全球茶叶消费量增长了 3%，表观消费量估计为 6,137,000 吨，而前一年为 5,968,000 吨。中国和印度占消费总量的 60% 以上。其他一些消费水平较高的国家有土耳其、巴基斯坦、俄罗斯联邦、美国、印度尼西亚、埃及、日本和孟加拉国。过去十年全球表观消费量增长率为 37%。

全球茶叶进口总量与上一年没有太大不同，低于 2019 年，这表明随着世界摆脱持续的疫情，茶叶消费量有可能增长。价格、消费群体、茶文化和产品多样化等多种因素都会影响茶叶消费。

巴基斯坦的进口总量为 2.47 亿公斤（其中 85% 来自肯尼亚），仍然是最大的进口国。巴基斯坦其他主要进口来源地包括卢旺达、乌干达、坦桑尼亚、越南、布隆迪和中国。

据了解，俄罗斯联邦的进口在 2021 年中保持稳定。茶叶大多以散装形式进口到联邦，因为进口关税有利于当地批发商。俄罗斯主要茶叶供应国是印度、肯尼亚、斯里兰卡、中国和越南。现在预测乌克兰战争和相关制裁将对茶叶市场和俄罗斯的茶叶进口产生何种影响还为时过早。

美国的进口量比上一年有所恢复，与疫情前的 2019 年进口量几乎持平。阿根廷、中国、印度、马拉维、斯里兰卡和越南是美国茶叶进口主要来源地。埃及的茶叶进口也呈现类似的恢复模式，该国近 90% 的茶叶进口来自肯尼亚。

英国在 2020 年的茶叶进口量较为可观，但 2021 年有所下降。导致消费下降的因素之一是批发商和超市转向其他替代品，例如特色产品市场中的调味茶和花草茶（它们与茶类似或者经常替代了真正的茶）。在有限且竞争激烈的饮料市场中，茶叶在积极争夺属于它的份额。由于过去两年中的物流问题，预计批发商将增加库存，但尚未体现在数据中。

摩洛哥是世界上最大的绿茶进口国，每年的进口量稳定在 7,000 万公斤左右，几乎所有茶叶都来自中国。

尽管伊朗（由于持续的制裁）和沙特阿拉伯（转向茶包）的进口量下降，但大多数中东国家的人均消费水平很高，其进口在 2021 年也有所恢复。阿联酋和伊拉克的进口增长明显。

近年来，非洲大陆进口量持续增长，在 2021 年增长了 5%，埃及、苏丹、加纳、利比亚和阿尔及利亚以及其他西非市场克服了疫情导致的物流问题。

截至 2019 年，中国进口量同比增长显著，2020 年保持稳定，2021 年进一步增长。

由于非产茶国对特种茶的兴趣有望维持可观的家庭消费量，而餐馆、咖啡馆等场所的开放会扩大户外销量，因此，当我们在摆脱疫情时，我们有理由保持乐观态度。然而，要增加茶在全世界的“喉咙份额”，依旧任重道远。

*Ian Gibbs was elected Chairman of the International Tea Committee in May 2016. On leaving school Ian served fourteen years with the British Army, which included tours in Belize and Berlin, and short spells in Australia and Kenya. He joined the tea trade in London in 1990 working with tea brokers Wilson Smithett until 2005 when he set up his own company. Ian joined the management board of the ITC in 2009 representing Malawi, and became Vice Chairman in 2010. A member of the Institute of Directors in London, Ian graduated in 2017 with a BA (Hons) at the Open University in the UK majoring in French and International Relations.*

***Ian Gibbs***

# Global Tea Review

Covid-19 has continued to affect almost every aspect of our lives during the last year, and continues to do so, with lockdowns, the temporary closure of ports, non-availability of containers for exports and escalating shipping costs being amongst the many challenges faced by us and most other trades. Delays along the supply chain and sharply increased costs have undoubtedly had a considerable impact across the tea trade with packers having to examine their policies on stock levels and raise prices.

As we move into 2022 there are signs that Covid's stranglehold is being loosened although we can expect to continue to be affected by it, albeit hopefully in an ever decreasing way, throughout the year and beyond. In addition, we now have the unwelcome consequences of the situation in Ukraine which will be felt across much of the industry especially amongst those exporters and packers who trade with The Russian Federation, the second largest tea importing country, and Ukraine and Belarus. The tea industry however, led by the dedicated efforts of the tea exporting countries, has managed to be resilient when facing such challenging situations in the past.

Overall global production in 2021 appears to be approximately 3% higher than 2020 with increased CTC availability in India, higher Orthodox production in China and Sri Lanka, and the continued growth of green and other teas in China. China is now responsible for nearly half of the global production of tea. In India, production grew by 6% during the year, but the total crop was still lower than that of 2019 due to inconsistent weather patterns with heavier rainfall and lengthy dry spells.

Production in Kenya, the country which exports the largest quantity of tea, was not as high as in 2020 which saw a record figure of 569 million kgs, but the total annual crop of 538 million kgs was 16% higher than that achieved in 2019. It appears that at the end of the year some of this increased





production is still held in stock by producers as it is in China.

Sri Lanka saw production recover to be on par with quantity produced in 2019. Following a government ban on the import of chemical fertilizers and pesticides that was in place for most of the year, there are concerns raised by the global tea industry regarding future implications on quality and quantity of tea as the industry closely watches these developments.

Turkey, Vietnam, Indonesia and Argentina are understood to have enjoyed a reasonably steady level of production during the year although Argentina is being hit by a savage heatwave which started towards the end of 2021 and is inevitably affecting all aspects of their production.

Global annual exports reached 1,890 million kgs in 2021, an increase of 3% (460 million kgs) against that of 2020 but this total was still lower than the total pre-pandemic exports seen in 2019. Final data has yet to be released, but exports from Kenya are expected to make up 30% of the total. China, Sri Lanka, India, Vietnam and Argentina were the other major exporters. The share of total exports as a percentage of total production continued to fall and was 29% in 2021.

Annual exports from Kenya during the year were a record 559 million kgs. This quantity includes teas of other East African origins sold in the Mombasa auction. Pakistan, the largest importing country in the world was responsible for nearly 40% of this quantity. Other countries that sourced significant quantities from Kenya were Egypt, UK, Russian Federation, UAE, Sudan, Kazakhstan, Yemen and Poland.

China's major markets were Morocco (and other North and West African countries), Uzbekistan, Russian Federation and Hong Kong. Iraq, Turkey, UAE, Russian Federation, Iran, China, Libya and Azerbaijan were Sri Lanka's key destination markets. In addition tea exporters are understood to be experiencing uncertainties associated with an unrealistic exchange rate.

Exports from India were boosted by increases in shipments to the Russian Federation, Iran, UAE and USA. However total exports are known to be lower as sales competed with growing in-home consumption (at healthy price levels), and with relatively cheaper teas from East African origins as well as a result of the challenges of shipping to Iran.

Prices at the auction centres in India were not as strong as in 2020 but they were higher than levels seen in 2019. The introduction of reserve (floor) prices for KTDA teas in Mombasa initially affected demand in the auction, but more teas were sold at improved price levels in the last three months of the year with these price levels continuing into 2022. In Sri Lanka, auction prices remained healthy with the depreciating Rupee being one factor.

As some countries gradually lifted their covid restrictions, those countries which witnessed a dip in consumption during the height of the pandemic saw a healthy recovery as a result of the reopening of hotels, restaurants, cafes etc. This was more evident in countries where a culture of in-home consumption of tea drinking is not that prevalent and overall consumption had remained stagnant or declined during the pandemic. In other markets where in-home consumption grew as a result of the pandemic it is hoped that this increase will be maintained either through on line sales direct from origin or from speciality tea shops.

In spite of numerous challenges faced by the global tea industry, tea consumption worldwide grew by 3% in 2021. Apparent global consumption for the year is estimated to be 6,137,000 metric tons against the previous year's figure of 5,968,000 metric tons. China and India account for more than 60% of this total. Turkey, Pakistan, Russian Federation, USA, Indonesia, Egypt, Japan and Bangladesh are some of the other leading countries with high levels of consumption. The growth in apparent global consumption over the last ten years is 37%.

Total global imports were not much different to the previous year and lower than in 2019, which indicates there is potential for growth of tea consumption as the world comes out of the ongoing pandemic. A multitude of factors such as

price, demographics, tea culture and product diversification influences tea consumption.

With a total quantity of 247 million kgs, Pakistan remained the largest importer. Kenya accounted for 85% of this quantity whilst Rwanda, Uganda, Tanzania, Vietnam, Burundi and China were the other main origins from where Pakistan imported their teas.

Imports into The Russian Federation are understood to have remained steady during the year. Tea is mostly imported into the Federation in bulk form as import tariffs are in place to favour local packers and the major suppliers were India, Kenya, Sri Lanka, China and Vietnam. It is too early to predict what effect the war in Ukraine and the related sanctions will have on the markets and tea imports into Russia.

Imports into the USA recovered from the previous year and reached a total almost on par with the quantity imported in 2019, prior to the pandemic. Argentina, China, India, Malawi, Sri Lanka and Vietnam were the leading origins. A similar pattern of recovery of imports was seen in Egypt with their major supplier Kenya responsible for almost 90% of total imports.

It was disappointing to note the decline of imports into the United Kingdom following a healthy intake in 2020. One of the factors contributing to this decline in consumption is a shift by packers and supermarkets to market alternatives such as flavoured and herbal infusions in the specialty products market alongside or often in place of real tea. Camelia sinensis is competing for its share of a finite and very competitive drinks market. Expectations that packers would be increasing their stock levels as a result of the logistical problems experienced over the last two years have yet to be seen in the figures.

Annual imports into Morocco, the largest Green Tea importing country in the world remained steady at around 70 million kgs with almost all their tea sourced from China.

Most Middle Eastern countries which boast healthy per capita consumption levels also recovered during the year even though imports into Iran (as a result of ongoing sanctions) and Saudi Arabia (a shift to tea bags) are known to be lower. Imports into UAE and Iraq grew noticeably.

Imports into the African continent which have continued to grow in recent years, grew by 5% in 2021 with Egypt, Sudan, Ghana, Libya and Algeria along with several West African markets overcoming logistical obstacles caused by the pandemic.

Imports into China which have been recording significant year on year growth up to 2019 and which remained steady in 2020 recorded further growth last year.

As we hopefully emerge from the pandemic there are grounds for optimism as the interest in speciality teas in the non-producing countries will hopefully maintain healthy sales for in-home consumption while out-of-home sales will expand as restaurants, cafes etc open up. However there is a great deal which needs to be done generically if we are to increase Camelia Sinensis's share of throat worldwide.

ASIA

亚洲



# 2021 年中国茶叶进出口贸易简析

于露

中国食品土畜进出口商会副会长，在进出口贸易领域有着超过 30 年的从业经历，农产品贸易领域、食品进出口贸易领域资深专家。

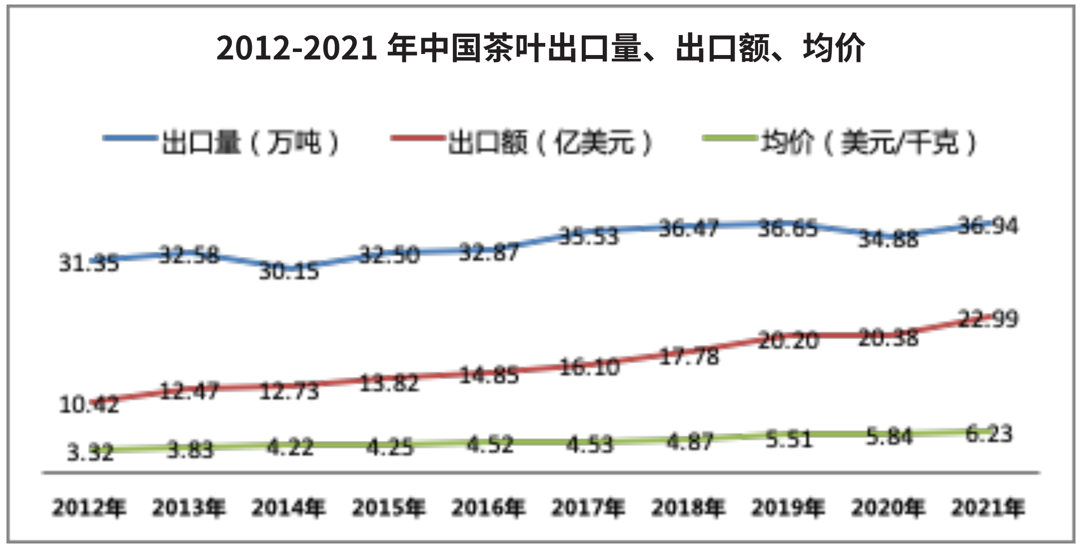
于露同志自 1988 年以来，在原经贸部、商务部工作多年，2010 年加入食土商会工作。自加入食土商会以来，于露同志与 80 多个国家和地区的政府领导、驻华使领馆领导、商协会和企业代表举行了近七百余场会谈，与国内外业界建立了广泛的联系。

于露同志是农产品贸易领域的资深专家，目前担任国际茶叶委员会（ITC）副主席和世界家禽协会（IPC）执行委员；代表行业成为金砖国家（BRICS）和 APEC 工商理事会农业组成员，推动金砖国家和 APEC 成员经济体深化农业合作；组织企业就欧盟禽肉关税配额合理分配问题诉诸 WTO 争端解决机制并取得胜诉；代表中国农产品行业赴美参加 301 听证会，组织企业完成了输美农产品、进口美国农产品的排除工作；负责进博会食品及农产品馆三届组馆工作，举办多场配套活动，为行业赢得广泛的声誉。

近年来，中国茶叶在生产、贸易、文化、消费等方面都取得了长足进步，中国茶业正在以更加稳健的步伐融入并引领世界茶业。2021 年，在国际形势严峻复杂和新冠肺炎疫情持续影响下，中国茶叶外贸顶住多重压力，取得了出口再创新高、进口稳步增长的好成绩。

## 一、茶叶出口量价齐增

根据海关统计，2021 年，中国茶叶出口 36.94 万吨，金额 22.99 亿美元，平均单价 6.23 美元 / 公斤，同比分别上升 5.89%、12.82%、6.68%，出口量、额、价均创历史新高。



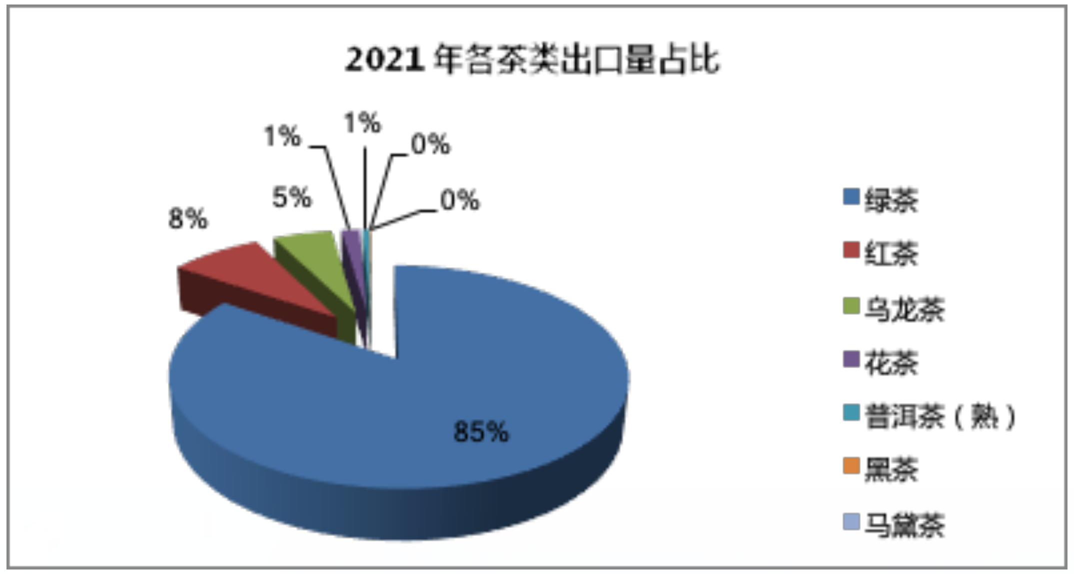
**（一）绿茶出口保持绝对优势**

绿茶出口 31.2 万吨，同比增长 6.43%，占茶叶出口总量 84.6%；金额 14.87 亿美元，同比增长 13.96%，占茶叶出口总额 64.68%；出口均价 4.76 美元 / 公斤，同比增长 6.97%。2012—2021 年十年间，绿茶出口量年均复合增长率为 2.54%。

**（二）红茶、乌龙茶出口增幅明显，花茶出口小幅下滑**

红茶出口 2.96 万吨，金额 4.15 亿美元，均价 14.02 美元 / 千克，同比分别上升 2.72%、20.47%、17.22%；乌龙茶出口 1.91 万吨，金额 2.82 亿美元，均价 14.71 美元 / 公斤，同比分别上升 13%、30.46%、15.46%；花茶出口小幅下滑，出口量 5,834 吨，金额 5,776 万美元，均价 9.9 美元 / 公斤，同比分别下降 4.82%、4.9%、0.1%。

其他茶类出口情况如下：普洱茶（熟普，海关税则号 09023031、09024031）出口 2,175 吨，金额 5,253 万美元，均价 24.14 美元 / 公斤；黑茶（普洱茶熟茶除外，海关税则号 09023039、09024039）出口 350 吨，金额 489 万美元，均价 13.98 美元 / 公斤；马黛茶出口 275 公斤，金额 20,488 美元，均价 74.5 美元 / 公斤。




**（三）多数主销市场需求旺盛**

2021 年，中国茶叶出口至 129 个国家和地区，多数主销市场需求旺盛，贸易保持稳定增长势头。前十位出口市场依次为摩洛哥、乌兹别克斯坦、加纳、俄罗斯、毛里塔尼亚、中国香港、塞内加尔、阿尔及利亚、多哥和美国。其中对摩洛哥出口量 7.46 万吨，约占我国茶叶出口总量的 20.2%。





**2021 年茶叶出口市场（出口量前十位）**

| 序号 | 国别 / 地区 | 出口量（万吨） | 同比 % | 出口额（万美元） | 同比 % |
|---|---|---|---|---|---|
| 1 | 摩洛哥 | 7.46 | 11.09 | 22800 | 15.19 |
| 2 | 乌兹别克斯坦 | 2.86 | 24.42 | 5609 | 38.97 |
| 3 | 加纳 | 2.28 | 21.9 | 10300 | 29.39 |
| 4 | 俄罗斯 | 1.81 | 22.63 | 5162 | 33.31 |
| 5 | 毛里塔尼亚 | 1.75 | 24.58 | 7600 | 26.23 |
| 6 | 中国香港 | 1.67 | 19.72 | 64700 | 39.25 |
| 7 | 塞内加尔 | 1.63 | -3.32 | 6993 | 3.73 |
| 8 | 阿尔及利亚 | 1.3 | -6 | 5026 | 6.71 |
| 9 | 多哥 | 1.2 | -31.74 | 5602 | -27.16 |
| 10 | 美国 | 1.09 | 13.65 | 6691 | 26.61 |

对金砖国家、独联体国家出口成绩亮眼，出口量分别是 1.93 万吨、5.38 万吨，同比分别增长 22.57%、21.07%，出口金额分别是 5620 万美元、1.42 亿美元，同比分别是 31.61%、13.02%，对欧盟、一带一路、中东的出口量也呈现不同程度的增长，分别是 2.78%、8.7%、7.41%。此外，值得关注的是，对 RECP 国家出口量额双减。

**（四）浙江继续领跑，贵州增长明显**

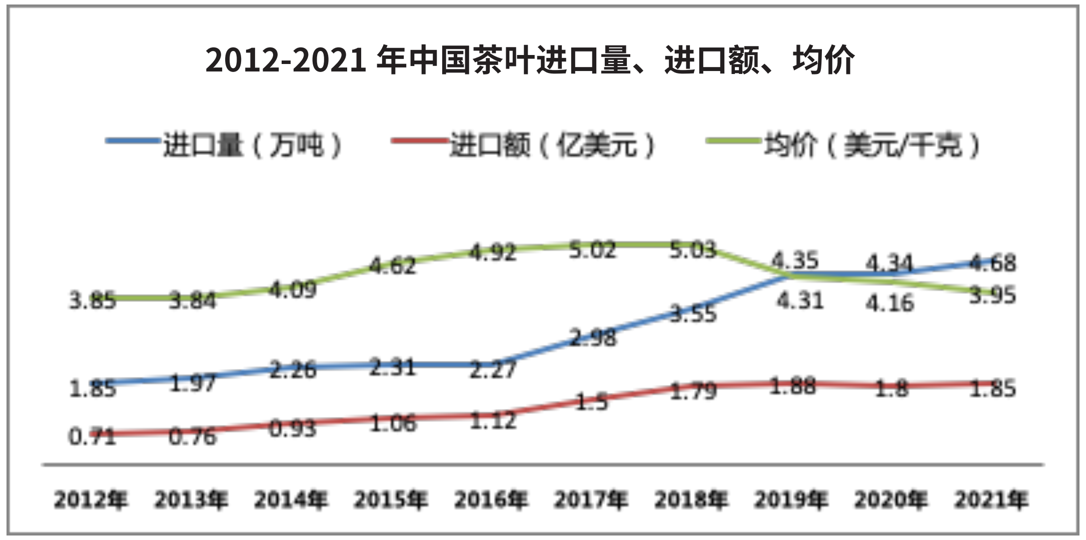
2021 年，中国茶叶出口前十位省市分别为浙江、安徽、湖南、福建、湖北、江西、河南、四川、贵州和广东。其中，浙江省出口量遥遥领先，约占全国茶叶出口总量的 40.8%，福建省出口额位居第一，约占全国茶叶出口总额的 22.3%。贵州出口量、出口额分别同比增长 81.24% 和 114.58%。

**2021 年茶叶出口省市（出口量前十位）**

| 序号 | 省市 | 出口量（万吨） | 同比 % | 出口额（亿美元） | 同比 % |
|---|---|---|---|---|---|
| 1 | 浙江 | 15.08 | 3.18 | 4.86 | 8.64 |
| 2 | 安徽 | 6.77 | 1.99 | 2.87 | 2.62 |
| 3 | 湖南 | 4.16 | 17.08 | 1.24 | 25.93 |
| 4 | 福建 | 2.61 | 18.83 | 5.13 | 22.84 |
| 5 | 湖北 | 2.35 | 28.16 | 1.90 | -5.8 |
| 6 | 江西 | 1.41 | -2.03 | 1.21 | 43.17 |
| 7 | 河南 | 0.91 | 22.52 | 0.41 | -23.37 |
| 8 | 四川 | 0.76 | -6.98 | 0.15 | -8.71 |
| 9 | 贵州 | 0.59 | 81.24 | 2.22 | 114.58 |
| 10 | 广东 | 0.52 | -20.38 | 0.65 | -17.59 |

## 二、茶叶进口量增价减

据海关统计，2021 年，中国茶叶进口 4.68 万吨，金额 1.85 亿美元，同比分别上升 7.98% 和 2.49%，平均单价 3.95 美元 / 公斤，同比下降 5.05%。

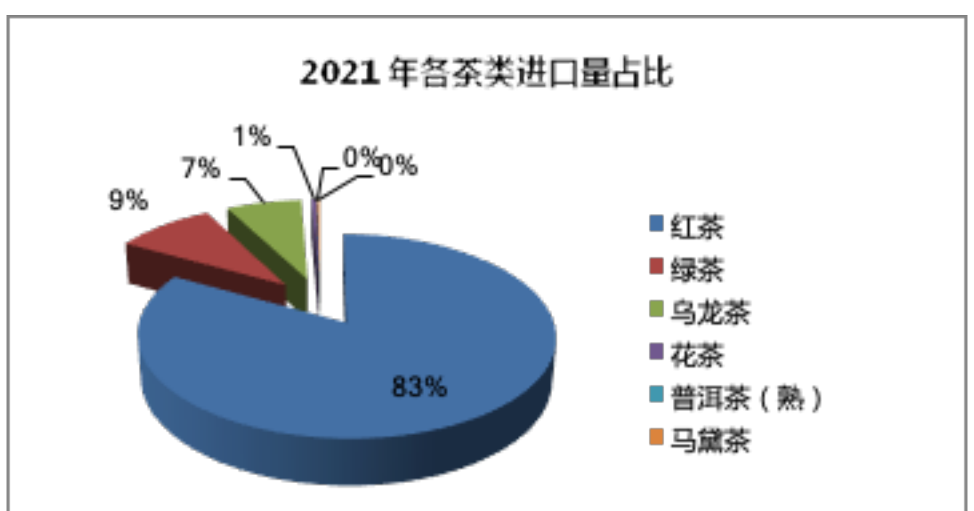



**（一）红茶、绿茶、乌龙茶进口量同比增长**

中国茶叶进口以红茶为主，占比超过 80%。2021 年，红茶、绿茶、乌龙茶的进口量均同比增长，进口均价同比呈现不同程度的下降。

**2021 年各茶类进口情况**

| 茶类 | 进口量 | 同比 % | 进口额 | 同比 % | 均价（美元 / 公斤） | 同比 |
|---|---|---|---|---|---|---|
| 红茶 | 3.89 万吨 | 9.81 | 1.38 亿美元 | 7.66 | 3.57 | -1.92 |
| 绿茶 | 4,333 吨 | 1.58 | 1,104 万美元 | -39.61 | 2.55 | -40.56 |
| 乌龙茶 | 3,261 吨 | 12.99 | 3,131 万美元 | 9.03 | 9.6 | -3.52 |
| 花茶 | 224 吨 | -56.63 | 306 万美元 | 5.35 | 13.67 | 137.33 |
| 马黛茶 | 98 吨 | -27.91 | 40.3 万美元 | -16.84 | 4.08 | 15.25 |
| 普洱茶（熟） | 3,854 公斤 | | 13.1 万美元 | -16.84 | 34.2 | |




**（二）斯里兰卡茶叶占绝对优势**

在茶叶进口市场中，前五位依次为斯里兰卡、印度、越南、肯尼亚和印度尼西亚。除印度外，自其他四个重点市场进口量和额呈现不同程度的增长。

**2021 年茶叶进口市场（进口量前五位）**

| 序号 | 国别 / 地区 | 进口量（吨） | 同比 % | 进口额（万美元） | 同比 % | 同比 |
|---|---|---|---|---|---|---|
| 1 | 斯里兰卡 | 15,200 | 9.57 | 7,627 | 12.83 | -1.92 |
| 2 | 印度 | 7,916 | -23.01 | 2,139 | -26.42 | -40.56 |
| 3 | 越南 | 5,478 | 52.35 | 982 | 62.94 | -3.52 |
| 4 | 肯尼亚 | 4,118 | 80.26 | 795 | 77.28 | 137.33 |
| 5 | 印度尼西亚 | 3,573 | 25.14 | 444 | 11.65 | 15.25 |

**（三）福建、云南进口大幅增长**

2021 年，中国茶叶进口前十位省市分别为福建、浙江、广东、北京、上海、江苏、云南、广西、安徽和山东。其中，福建、浙江、广东进口数量和金额均呈现大幅增长，三个省份的进口量约占全国进口总量的 58%。

**2021 年茶叶进口省市（进口量前十位）**

| 序号 | 省市 | 进口量（吨） | 同比 % | 进口额（万美元） | 同比 % |
|---|---|---|---|---|---|
| 1 | 福建 | 12,174.6 | 52.05 | 4,431.5 | 47.87 |
| 2 | 浙江 | 8,938.6 | 8.10 | 2,223.4 | 17.18 |
| 3 | 广东 | 6,063.8 | 16.33 | 2,617.5 | 19.72 |
| 4 | 北京 | 4,402.9 | -24.23 | 1,512.9 | -19.76 |
| 5 | 上海 | 4,323.8 | -10.67 | 4,395.9 | -11.22 |
| 6 | 江苏 | 3,959.6 | -30.38 | 1,247.2 | -29.22 |
| 7 | 云南 | 3,120.2 | 122.96 | 441.4 | 99.68 |
| 8 | 广西 | 1,735.0 | -16.88 | 650.5 | -8.01 |
| 9 | 安徽 | 954.0 | -29.09 | 382.8 | -13.85 |
| 10 | 山东 | 478.0 | 49.89 | 253.0 | -65.54 |

## 三、中国茶叶外贸喜忧参半，挑战与机遇并存

**（一）茶叶出口存在诸多隐忧**

尽管中国茶叶出口数量、金额和单价持续增长，但是存在诸多隐忧，主要表现为：一是成本上涨和人民币

汇率升高等因素，致使企业利润空间十分有限，甚至存在产品价格倒挂现象；二是新冠肺炎疫情发生以来，国际物流成本居高不下，进一步压低了企业利润，有些企业为了保住客户和回流资金，不挣钱甚至赔钱出口，不具可持续性；三是国际市场不断提高茶叶农药残留限量要求，增加了企业经营成本和贸易风险；四是国际形势复杂多变，加之疫情对全球影响尚未消退，市场需求量受到一定程度影响。

**（二）茶叶进口潜力逐渐释放**

近年来，中国茶叶进口稳步增长，2012—2021 年 10 年平均复合增长率为 10.9%。主要原因为：一是中国茶叶生产成本不断上涨，国外红茶原料茶更具价格优势；二是外资或合资企业在华生产红茶类袋泡茶、奶茶、柠檬茶等产品的原料需求上涨；三是国外茶商纷纷拓展潜力巨大的中国茶叶消费市场，通过文化推广、品质宣传和新品研发等方式吸引了部分中高端消费者和年轻消费群体。

**（三）严峻挑战背景下伴随新的机遇**

1、近年来，中国更加重视对茶及茶文化的宣传与推广，不断强化茶产业在脱贫攻坚以及乡村振兴中村所扮演的角色，尤其是“三茶统筹”理念提出之后，中国茶在国内外的地位逐步提高，有利于推动茶产业发展。

2、经历了前两年诸多困难的考验，多数企业在艰难中积极求变，如拓展德国、法国等中高端消费市场；加快优化出口产品结构，由利润微薄的大宗茶为主向高附加值的有机茶、名优茶为主转变；扩大内销业务，开发进口业务、跨境电商业务等，为下一步发展奠定了基础。

3、疫情发生以来，人民对健康有了全新的认知，茶的保健功能倍受关注，健康产品、多元化茶产品需求日益增长。绿茶、特色茶、有机茶等消费呈逐年增长态势，“国际茶日”的确立也对促进全球茶叶消费发挥了显著作用。

4、《中欧地理标志协定》和 RCEP 区域全面经济伙伴关系协定，以及国际国内双循环战略等国际贸易和国家政策方面的利好，也为茶叶国际贸易企业创造了更多的机遇。

5、近两年茶 + 互联网的商业模式更加普遍，使得茶叶营销取得了跨越式发展。随着 5G 的到来，人工智能（AI）和物联网（IoT）等高科技的快速发展和深入应用，将对今后茶叶贸易营销模式产生巨大的影响。

## 四、顺势而为，未来可期

随着国际贸易中不确定、不稳定因素增多，以出口为导向的茶叶企业，在选择贸易伙伴时需更加慎重，同时要做好成本调控，让产能与产量更好地匹配市场需求。计划开拓国内市场的企业，需做好企业定位，明确目标市场和客户群体。企业既要把握茶叶质量安全这条生命线，也要在产品研发、多领域、多场景应用等方面下更大功夫，发挥茶叶更大价值。

20 多年来，食土商会一直致力于中国茶叶贸易促进工作，通过宣传中国茶叶和茶文化带动贸易发展已日见成效。未来，商会将继续积极参与国际茶事活动，促进中国主导和制定有关规则和标准，发挥茶叶大国引领作用；深化打造“国际茶业大会”“国际茶业年会”等平台，扩大吸引国外茶叶行业来中国实地考察，增进其对中国茶产业的认识以及对中国茶的理解；在主要消费国市场开展产品展示展销、茶艺比赛、茶艺培训和交流推介等活动；利用好新型社交平台，借助互联网促进中国茶文化和知识的海外宣传与国际交流；促进中国茶叶出口行业制定团体标准和标识认证、茶叶外贸转型升级基地推荐以及“黑白名单”通报制度等。我们将继续携手全球茶人，为茶产业的美好未来而努力。



# Overview of China’s Tea Trade in 2021

***Ms. Yu Lu***


*Ms. Yu Lu has more than 30 years of working experience in the field of import and export, and she is a veteran expert in the field of international trade of food and trade in agricultural products.*

*From 1988 to 2010, Ms. Yu Lu worked for the former Ministry of Foreign Trade and Economic Cooperation (MOFTEC) and the Ministry of Commerce (MOFCOM).*

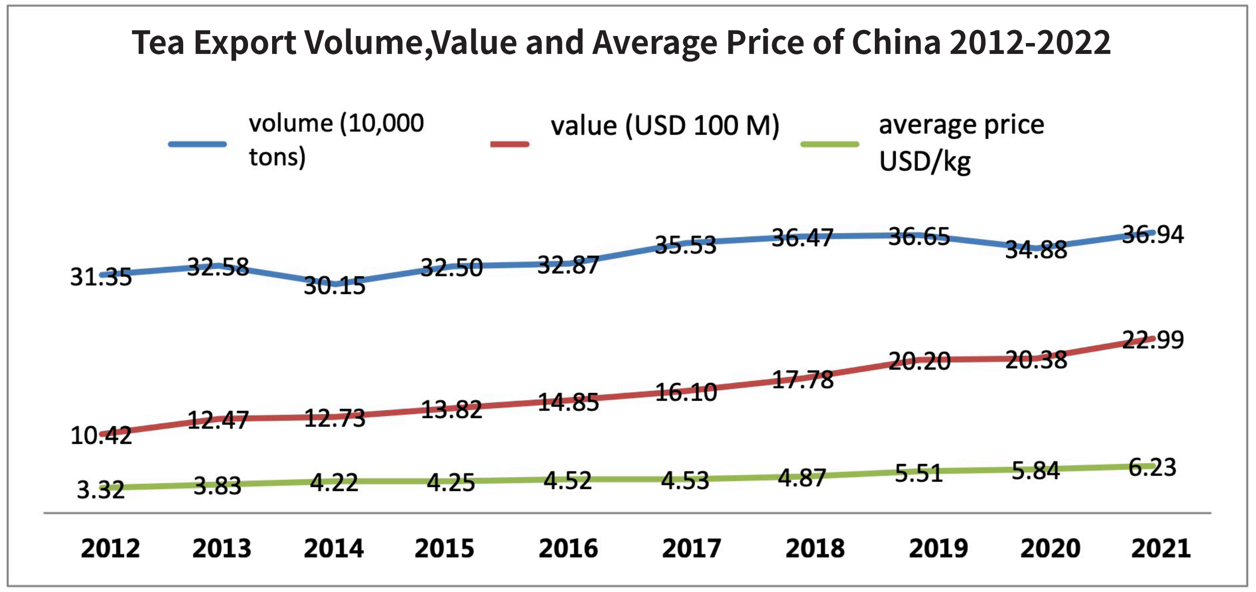
*Since joining the CFNA in 2010, Ms. Yu Lu has held nearly 700 talks with representatives from foreign governmental departments, embassies and consulates in China, business associations and enterprises from more than 80 countries and regions, and has established extensive contacts with domestic and international industries.*

*Now, she is the vice chairman of the International Tea Committee (ITC), the executive member of the International Poultry Council (IPC) and a member of the agricultural groups of BRICS Business Council and APEC China Business Council. In the course of dealing with the issue of the distribution of EU tarrif quotas for poultrymeat, she worked with Chinese enterprises to resort to WTO Dispute Settlement Mechanism and secured victory. On behalf of China's agricultural products industry, she attended the Section 301 public hearing in America and together with Chinese enterprieses, she completed the exclusion process for Chinese agricultural products exported to America and agricultural prodcuts imported from America. She organized the food and agricultural products pavilion of three China International Import Expo(CIIE)and held a number of supporting activities, winning a wide reputation within the global food and agriculture trade industry.*


In recent years,China has come a long way in tea production, trade, culture and consumption and etc, and it's becoming a leader in global tea industry thanks to the greater integration of its tea industry into the outside world. In 2021, faced with ongoing Covid-19 and complex and challenging international environment, China's tea trade has performed well despite pressures and obstacles with tea exports recording a new high and tea imports maintaining steady growth.

### 1.Tea Export Registered Growth both in Volume and Value

According to China Customs, China tea exports totaled 369,400 tons in 2021, with a total value of USD 2.299 billion and an average price of USD 6.23/kg, up 5.89%, 12.82% and 6.68% respectively from a year ago, all hitting a new high.



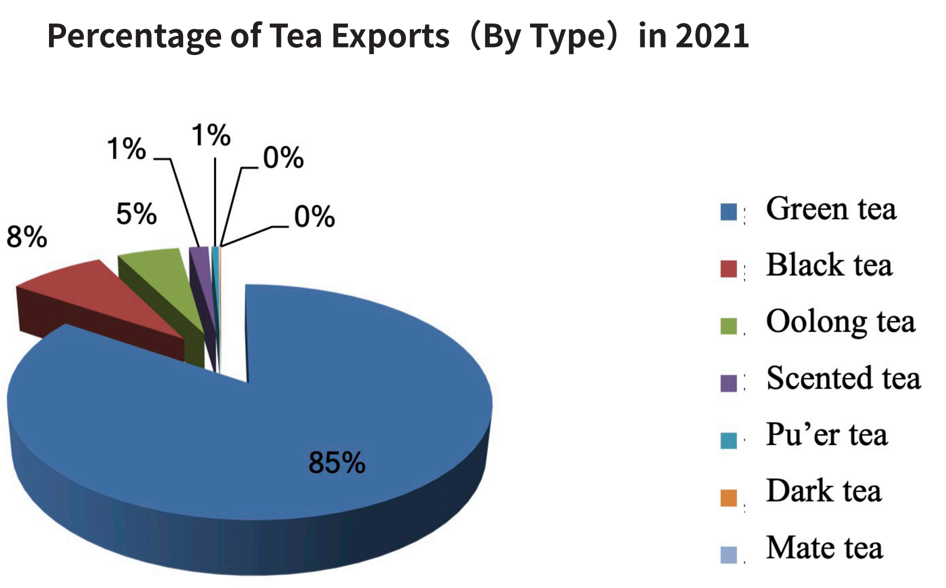

### 1.1 Green Tea had an Absolute Advantage in Exports

In 2021, green tea exports totaled 312,000 tons, up 6.43% from a year ago, accounting for 84.6% of China's total tea exports; the value of green tea exports stood at USD 1.487 billion, up 13.96% from a year ago, accounting for 64.68% of China's total. And the prices averaged USD 4.76/Kg, up 6.97% from a year ago. From 2012 to 2021, the compound annual growth rate for green tea exports is 2.54%.

### 1.2 Black and Oolong Tea Exports Saw a Remarkable Growth While Scented Tea Exports dropped Slightly

In 2021, black tea exports totaled 29,600 tons with a value of USD 415 million and an average price of USD 14.02/kg, up 2.72%, 20.47% and 17.22% from a year ago respectively. Oolong tea exports totaled 19,100 tons with a value of USD 282 million and an average price of USD 14.71/kg, up 13%, 30.36% and 15.46% from a year ago respectively. Scented tea exports were 5,834 tons and valued at USD 57.76 million with the average price at USD 9.9/Kg, down 4.82%, 4.9% and 0.1% from a year ago respectively.

The export figures for other types of tea are as follows: Pu'er tea (HS Code 09023031,09024031) exports totaled 2,175 tons, with a value of USD 52.53 million and the prices averaging USD 24.14/Kg. Dark tea (HS Code 09023039,09024039) exports totaled 350 tons, valued at USD 4.89 million with the prices averaged USD 13.89/Kg. Mate tea exports totaled 275 kg,valued at USD 20,488 with the prices averaging USD 74.5/Kg.




### 1.3 Strong Demand from Main Export Markets

In 2021, China exported its tea to 129 countries and regions around the world. We continued to see strong demand from many of our main tea markets. The top ten tea export markets are Morocco, Uzbekistan, Ghana, Russia, Mauritania, China Hong Kong, Senegal, Algeria, Togo and America. 74,600 tons of tea went to Morocco in 2021, accounting for 20.02% of China's total tea exports.

**Top 10 Tea Export Markets for China**

| No. | Country/Region | Volume (10,000 tons) | YoY% | Value (10 thousand USD) | YoY % |
|---|---|---|---|---|---|
| 1 | Morocco | 7.46 | 11.09 | 22,800 | 15.19 |
| 2 | Uzbekistan | 2.86 | 24.42 | 5,609 | 38.97 |
| 3 | Ghana | 2.28 | 21.9 | 10,300 | 29.39 |
| 4 | Russia | 1.81 | 22.63 | 5,162 | 33.31 |
| 5 | Mauritania | 1.75 | 24.58 | 7,600 | 26.23 |
| 6 | China Hong Kong | 1.67 | 19.72 | 64,700 | 39.25 |
| 7 | Senegal | 1.63 | -3.32 | 6,993 | 3.73 |
| 8 | Algeria | 1.3 | -6 | 5,026 | 6.71 |
| 9 | Togo | 1.2 | -31.74 | 5,602 | -27.16 |
| 10 | America | 1.09 | 13.65 | 6,691 | 26.61 |

China exported 19,300 and 53,800 tons of tea to BRICS and CIS countries, up 22.57% and 21.07% from a year ago respectively, and the export value stood at USD 56.2 million and USD 142 million, up 31.61% and 13.02% from a year ago respectively. We also saw growth in exports to the EU, Belt and Road and the Middle East countries at various degrees and the three markets were up 2.78%, 8.7% and 7.41% from a year ago respectively. In addition, it's noteworthy that tea exports to RCEP countries were down in both volume and value.

**1.4 Zhejiang Remained the Top Tea Exporting Province in China and Guizhou Saw Remarkable Growth in Exports**

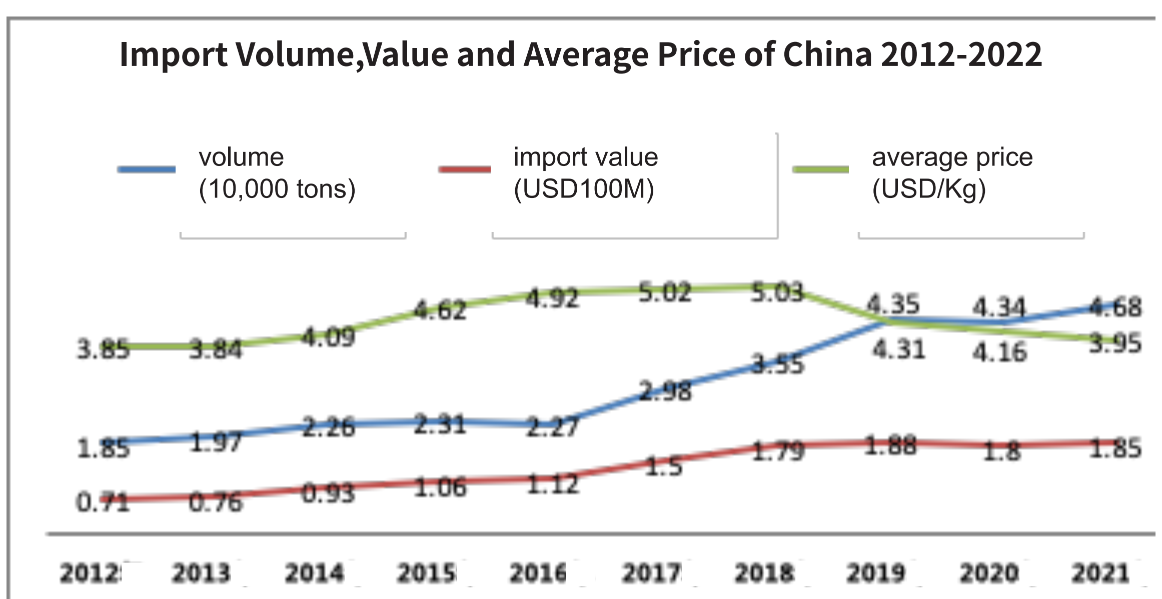
In 2021, the top ten tea exporting provinces in China are Zhejiang, Anhui, Hunan, Fujian, Hubei, Jiangxi, Henan, Sichuan, Guizhou and Guangdong. Zhejiang's tea export volume is second to none in China, accounting for 40.8% of China's total and Fujian's tea export value rank first in China, accounting for 22.3% of China's total. The export volume and value in Guizhou grew by 81.24% and 114.58% over last year respectively.

**Top 10 Tea Exporting Provinces in China**

| No | Province | Volume (10,000 tons) | YoY % | Value (USD100 M) | YoY % |
|---|---|---|---|---|---|
| 1 | Zhejiang | 15.08 | 3.18 | 4.86 | 8.64 |
| 2 | Anhui | 6.77 | 1.99 | 2.87 | 2.62 |
| 3 | Hunan | 4.16 | 17.08 | 1.24 | 25.93 |
| 4 | Fujian | 2.61 | 18.83 | 5.13 | 22.84 |
| 5 | Hubei | 2.35 | 28.16 | 1.90 | -5.8 |
| 6 | Jiangxi | 1.41 | -2.03 | 1.21 | 43.17 |
| 7 | Henan | 0.91 | 22.52 | 0.41 | -23.37 |
| 8 | Sichuan | 0.76 | -6.98 | 0.15 | -8.71 |
| 9 | Guizhou | 0.59 | 81.24 | 2.22 | 114.58 |
| 10 | Guangdong | 0.52 | -20.38 | 0.65 | -17.59 |

**2.Tea Import Registered an Increase in Volume and a Decrease in Value**

According to China Customs, in 2021, China's tea imports totaled 46,800



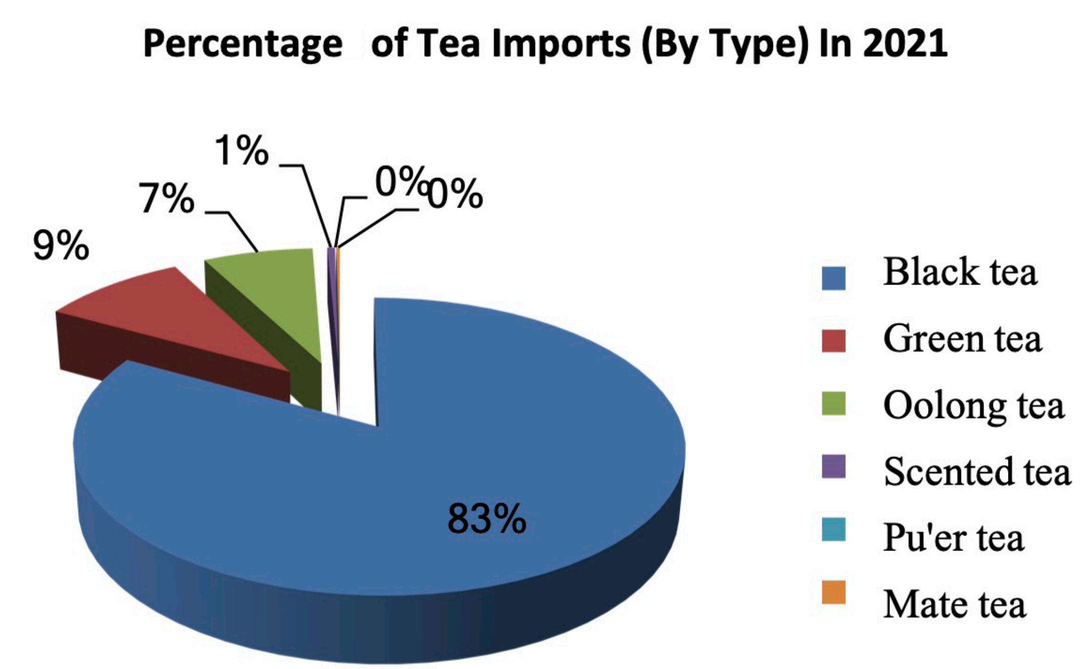

tons with a value of USD 185 million, up 7.98% and 2.49% from a year ago respectively. The prices averaged USD 3.95/kg, down 5.05% from a year ago.

**2.1 Black Tea, Green Tea and Oolong Tea Imports Registered Growth**

China's tea imports are mainly black tea from other countries with its import volume accounting over 80% of China's total tea imports. In 2021, black tea, green tea and Oolong tea imports registered growth from a year ago while the average prices for each decreased from a year ago.

**Top 10 Tea Exporting Provinces in China**

| Type | Volume (tons) | YoY % | Value (100 M) | YoY % | Average price ($/Kg) | YoY % |
|---|---|---|---|---|---|---|
| Black tea | 38,900 | 9.81 | 138 | 7.66 | 3.57 | -1.92 |
| Green tea | 4,333 | 1.58 | 11.04 | -39.61 | 2.55 | -40.56 |
| Oolong tea | 3,261 | 12.99 | 31.31 | 9.03 | 9.6 | -3.52 |
| Scented tea | 224 | -56.63 | 3.06 | 5.35 | 13.67 | 137.33 |
| Mate tea | 98 | -27.91 | 0.4 | -16.84 | 4.08 | 15.25 |
| Pu'er tea | 3,854 kg | | 0.13 | | 34.2 | |



## 2.2 Sri Lanka Represents the Largest Source of China's Tea Imports

The top five tea import markets for China are Sri Lanka, India, Vietnam, Kenya and Indonesia. China's tea imports in both volume and value from these market registered growth, excluding India.

**Top Five Tea Import Markets for China**

| No. | City | Volume（tons) | YoY % | Value ($10,000) | YoY % |
|---|---|---|---|---|---|
| 1 | Sri Lanka | 15,200 | 9.57 | 7627 | 12.83 |
| 2 | India | 7,916 | -23.01 | 2139 | -26.42 |
| 3 | Vietnam | 5,478 | 52.35 | 982 | 62.94 |
| 4 | Kenya | 4,118 | 80.26 | 795 | 77.28 |
| 5 | Indonesia | 3,573 | 25.14 | 444 | 11.65 |

## 2.3 Fujian and Yunnan's Tea Imports Saw a Big Increase

In 2021, the top ten tea importing provinces and cities are Fujian, Zhejiang, Guangdong, Beijing, Shanghai, Jiangsu, Yunnan, Guangxi, Anhui and Shandong. The tea imports (both volume and value) into Fujian, Zhejiang and Guangdong rose dramatically, accounting for roughly 58% of China's total imports.

**Top Ten Tea Importing Provinces and Cities**

| No. | Province/City | volume（tons) | YoY % | value（$10,000) | YoY % |
|---|---|---|---|---|---|
| 1 | Fujian | 12,174.6 | 52.05 | 4,431.5 | 47.87 |
| 2 | Zhejiang | 8,938.6 | 8.10 | 2,223.4 | 17.18 |
| 3 | Guangdong | 6,063.8 | 16.33 | 2,617.5 | 19.72 |
| 4 | Beijing | 4,402.9 | -24.23 | 1,512.9 | -19.76 |
| 5 | Shanghai | 4,323.8 | -10.67 | 4,395.9 | -11.22 |
| 6 | Jiangsu | 3,959.6 | -30.38 | 1,247.2 | -29.22 |
| 7 | Yunnan | 3,120.2 | 122.96 | 441.4 | 99.68 |
| 8 | Guangxi | 1,735.0 | -16.88 | 650.5 | -8.01 |
| 9 | Anhui | 954.0 | -29.09 | 382.8 | -13.85 |
| 10 | Shandong | 478.0 | 49.89 | 253.0 | -65.54 |

# 3.China's Tea Trade is Faced with Opportunities and Challenges

## 3.1 Concerns about China's Tea Export

Although the numbers of export volume, value and average prices continued growing, plenty of concerns remain: First, rising cost, appreciation of CNY and other factors leave tea companies with low margins and even result in price inversion; Second, since the pandemic began, the international logistic costs have stayed high, squeezing profits margins for tea companies, and some exported tea are trying to retain clients and bring back money at the expense of zero profit or even losing money, which is un-sustainable. Third, more strict requirements were introduced for the MRLs on tea, which drives up the operating costs and trade risks. Fourth, the complex, volatile international landscape and the ongoing COVID-19 are still affecting the market demand.

## 3.2 The Import Potential Continues to Unleash

China has enjoyed steady growth in terms of tea imports in recent years and the compound annual growth rate (2012-2021) for tea import is 10.9%. The reasons are as follows: First, the cost of tea production in China continues to rise and black tea raw materials from other countries enjoy more price advantages compared with China. Second, the foreign-funded or joint venture enterprises are importing more and more raw materials into China to produce tea products like tea bags, milk tea, lemon tea and etc. Third, foreign tea companies are tapping into the huge potential of China's tea market and they're trying to get the attention of the young generation and mid- and high-end consumers by spreading cultures, advertising quality and launching new products.

### 3.3 New Opportunities amid Challenging Situation

First, in recent years, China has paid more attention to the promotion of tea and its cultures and reinforced the role of tea industry in helping alleviate poverty and implement rural revitalization strategy. After the "Three Tea (tea culture, tea industry and tea science)" has been introduced, Chinese tea will receive more attention and support, which is good for the development of tea industry.

Second, having stood the test of hardships over the past two years, most tea companies have been actively adapting to changes amid difficult times, for example, some are venturing into mid-and high-end consuming market like Germany and France, some are optimizing the mix of exported products, namely shifting from bulk tea to organic tea, and famous, high-quality teas with high value added. Some are investing more in domestic market and developing cross-border e-commerce and import businesses.

Third, since the pandemic began, the public has become more health-conscious, which directs people's attention to the health benefits of tea and drives the demand for health-boosting and functional tea products. People have been consuming more and more green tea, specialty tea and organic tea in recent years, and the establishment of "International Tea Day" has played a big part in promoting the global tea consumption.

Fourth, China-EU Agreement on Geographical Indications, RCEP and "dual circulation" development pattern and the likes are creating more opportunities for the enterprise specializing in international tea trade.

Fifth, the business model of "tea +internet" has become more and more popular in these years, and the tea marketing has achieved leapfrog development. With the 5G hitting the market and rapid development and application of high technology like AI and IoT, the marketing model in tea industry will surely be greatly affected.

## 4.Seize the Momentum and the Best is Yet to Come

As the uncertain and unstable international trade environment is here to stay, export-oriented tea companies should be more prudent when looking for trade partners and at the same time control and adjust costs so that the production capacity and output can be in line with the market demand. In addition, for those who are turning to domestic market, they should be clear about its positioning, target markets and customer bases. Tea companies should not only attach great importance to quality and safety, but also double efforts to develop new products, expand the scope of application of tea so as to get more value out of it.

CFNA has been dedicated to facilitating China's tea trade for over two decades and our efforts to advance tea trade by promoting tea and tea culture have been paying off in a gradual way. We'll continue to take part in international tea events, and China will play its leadership role as the largest tea producer. In addition, we will continue to improve the platforms like International Tea Forum and Annual International Tea Conference so as to attract them to visit China and get to know more about China's tea industry and Chinese teas. We will organize tea events like exhibitions and competitions, trainings in major tea consuming countries. We'll make good use of the new social media platform to promote Chinese tea and its culture overseas and exchanges between countries. We will also advance the establishment of group standards, blacklist and whitelist and certification of GIs for the tea export industry. We will continue to work together with global tea people for a brighter future.

1987 年，邦德拉博士获得了卢哈纳大学的荣誉农学学士学位，后来加入斯里兰卡茶叶小生产者发展局，任大区经理助理。1994 年，获得英国雷丁大学农业推广硕士学位。1997 年，升职为发展局的大区经理，之后再次晋升为高级大区经理。2017 年，他获得斯里兰卡卢哈纳大学农学院哲学博士学位，撰写了多篇研究论文、文章和多本书目，内容多贴近斯里兰卡以及全球茶业研究。2020 年 1 月，他从斯里兰卡茶叶小生产者发展局辞职，目前是斯里兰卡茶叶行业的高级顾问，还是斯里兰卡卢哈纳大学农业学院董事会成员兼客座讲师。目前，他正与该学院一起进行研究生学术研究（包括茶叶行业的研究）。他目前是斯里兰卡茶叶领域里最著名的高级顾问之一，拥有 34 年的行业经验。他目前担任斯里兰卡灌溉部部长的协调秘书。

**邦德拉博士**

# 2021 年斯里兰卡茶叶行业概况

与 2020 年相比，尽管利益相关者们面临诸多挑战与问题，但斯里兰卡茶叶行业在 2021 年仍旧取得了更好的成绩。

## 茶叶产量

2021 年，斯里兰卡茶叶总产量为 29.93 万吨，比 2020 年（27.85 万吨）增长 2 万多吨。从累计产量来看，各海拔产区的产量较 2020 年相比实现大幅上涨。

有趣的是，与 2019 年（产量约为 30 万吨）相比，2021 年累计茶叶产量下降了 780 吨。从累计产量来看，中高海拔产区产量较 2019 年有所上涨，但低海拔产区产量较 2019 年却下降 6,670 吨。

| 年份 | 总产量 ( 百万千克 ) |
|---|---|
| 2019 | 300.12 |
| 2020 | 278.85 |
| 2021 | 299.34 |

（数据来源：斯里兰卡茶叶局）





斯里兰卡主要生产传统红茶，其次是 CTC 茶，以及 2021 年生产了少量绿茶。

目前斯里兰卡 2021 年 1-12 月的茶产量数据如下表所示（单位：吨）

| 类别 | 数量 ( 吨 ) |
|---|---|
| 传统红茶 | 270,571 |
| CTC | 26,195 |
| 绿茶 | 2,572 |
| 总计 | 299,338 |

（数据来源：斯里兰卡茶叶局）

## 2021 年茶叶出口

2021 年斯里兰卡茶叶出口总量为 28.6 万吨，与 2020 年（约 26.5 万吨）相比上涨 20,450 吨。与 2019 年斯里兰卡茶叶出口量（约为 29.3 万吨）相比，2021 年累计茶叶产量小幅下降。

所有主要茶产品类别（散装茶、茶包和包装茶）的出口量与 2020 年相比有所上涨。

2021 年茶叶出口额 2,633.5 亿卢比，与 2020 年的 2301.7 亿卢比相比上涨 331.8 亿卢比， 同时也超过 2019 年的 2,406 亿卢比，创下新高。

以美元计算，2021 年茶叶出口收入约为 13 亿美元，2020 年为 12.13 亿美元。

| 年份 | 茶叶出口总量 ( 百万千克 ) | 茶叶出口收益 ( 十亿美元 ) |
|---|---|---|
| 2020 | 286.02 | 1.3 |
| 2021 | 265.57 | 1.213 |

（数据来源：斯里兰卡茶叶局）

FOB 价为 920.76 卢比，与 2020 年 1-12 月的 866.70 卢比相比增加了 54.06 卢比，超过 2020 年最高记录，再创历史新高，而 2019 年，每公斤茶叶出口价仅为 823 卢比。2021 年 FOB 价格（卢比）在 2021 年大幅增加，尽管以美元计算，呈现小幅下降。

散装茶和包装茶的 FOB 价格以美元计价出现边际负方差，而茶包的 FOB 价格与 2020 年同期相比呈现健康增长态势。

| 年份 | FOB 价格 / 千克 ( 卢比 ) |
|---|---|
| 2020 | 866.70 |
| 2021 | 920.76 |

斯里兰卡主要出口包装茶和散茶，然后是茶包以及少量的绿茶和速溶茶。

| 类别 | 2021 出口量（吨） | 占比（%） |
|---|---|---|
| 散装茶 | 125,388 | 43.8 |
| 包装茶 | 128,344 | 44.9 |
| 茶包 | 24,665 | 8.6 |
| 速溶茶 | 3,032 | 1.1 |
| 绿茶 | 4,587 | 1.6 |
| 总量 | 286,016 | 100 |

（数据来源：斯里兰卡茶叶局）

伊拉克已成为锡兰茶的第一大进口国，2021 年进口量同比增长 27%。土耳其已降至第 2 位，进口同比下降 23.5%，其次是俄罗斯，进口同比下降 7.6%。阿联酋已升至第 4 位，进口大幅增加（同比增长 167%）。伊朗已下降至第 5 位，2021 年进口同比小幅上涨 4.7%。其他值得注意的进口国有中国、利比亚、阿塞拜疆、智利和叙利亚。与此同时，智利、叙利亚和沙特阿拉伯等国的进口量也有所下降。值得注意的是，利比亚和日本的进口量同比分别大幅增长 58% 和 17%。

**2020 和 2021 年斯里兰卡茶叶主要出口市场（单位：吨）**

| 国家 | 2021 | 2020 |
|---|---|---|
| 伊拉克 | 42,455 | 33,377 |
| 土耳其 | 29,741 | 38,866 |
| 俄罗斯 | 27,356 | 29,608 |
| 阿联酋 | 23,149 | 8,670 |
| 伊朗 | 15,833 | 15,127 |
| 中国 | 14,237 | 14,123 |
| 利比亚 | 12,339 | 7,806 |
| 阿塞拜疆 | 10,591 | 10,303 |
| 智利 | 8,834 | 9,419 |
| 叙利亚 | 7,779 | 9,536 |

（来源：福布斯和沃克茶叶经纪公司 Forbes and Walker Tea Brokers）

不好的是我们的茶叶生产力在一段时间内一直在下降。这是由于缺乏茶叶重栽和补植，以及生产者无法应对气候变化影响和其他因素，因为尽管使用了肥料，土壤还是逐渐受到侵蚀，土地也在退化。

土地和劳动力生产率低，管理费用高以及气候变化和 Covid-19 的不利影响等因素推高了茶叶生产成本。

## 斯里兰卡茶叶小农部门

斯里兰卡有超过 450,000 个茶叶小农户，有 150 万茶农以茶谋生，占茶叶种植总面积的近 60%。茶叶小农部门每年贡献了茶叶总产量的近 75%。2021 年，这个子部门生产了 22.3 万吨茶，占总产量的 74.5%。因此，这个子部门是斯里兰卡茶叶产业的支柱。

## 展望未来

斯里兰卡政府于 2021 年全面禁止进口化肥和除草剂，以促进和鼓励有机农业走向环保绿色农业。

由于化肥在 2021 年中期前后遭到抛弃，其对茶叶行业的不良影响是可能会在 2022 年第一季度造成损失。由于政府最近撤销了化肥禁令，预计从 2022 年第二季度开始，如果不出现极端天气的话，产量会出现一定程度的恢复。然而，由于政府取消化肥补贴，茶树老化、生产力水平低下，施肥量低，仍然是一个不利因素。

斯里兰卡政府已采取多项措施，以可持续的方式发展茶产业。2021 年，政府对茶叶种植的补贴有所增加，茶叶再种植补贴从每公顷 50 万卢比增加到 63 万卢比。新种植茶叶从每公顷 40 万卢比增加到 50 万卢比 / 公顷。空置补贴是每株 100 卢比，以鼓励茶叶小农户开发土地。

此外，每月还发放 5,000 卢比的津贴，为期 24 个月，以补偿低收入茶叶小农户在重新种植过程中的收入损失，还提供各类设施和援助，例如提供优质茶树，为建立微灌系统提供补贴，并在 2021 年期间为低收入茶叶小农户家庭提供机械设备和新技术以及额外的收入来源等。

斯里兰卡茶叶局还更加关注价值链的前端，在“锡兰茶全球推广”下开展推广活动，并制定积极的营销策略。此外，在所有行业利益相关者的支持下通过保持茶叶最低浓度的农残以及展示其可持续性认证（包括锡兰茶的纯度和健康属性），强化世界上最干净的茶的品牌故事。

因此，有了斯里兰卡政府的介入，茶叶行业的未来会更好。

# An Oveview of Sri Lanka Tea Industry in 2021

*Dr. G.G. Bandula joined with the Tea Small Holdings Development Authority (TSHDA) of Sri Lanka as an Assistant Regional Manager (Extension), after obtaining his B. Sc Agriculture (Hons) degree from the University of Ruhuna in 1987. He had qualified for the M. Sc degree in Agricultural Extension from the University of Reading, UK in 1994 and then he had been promoted as the Regional Manager of the TSHDA in 1997. Dr. Bandula obtained his Doctor of Philosophy degree (P. hD) in Agricultural Extension from the University of Ruhuna, Sri Lanka in 2017 and he has written many research papers, articles and books, which are more relevant and useful to tea industry in Sri Lanka and globally as well. Dr. Bandula left the TSHDA with the capacity of Senior Regional Manager in January 2020 and currently he works as one of the senior consultants, of the tea industry in Sri Lanka. In addition, he is a board member of faculty of agriculture, University of Ruhuna, Sri Lanka and he is also working as a visiting lecturer there. He is doing post graduate research and academic studies and examination works with the faculty, including the research studies in the tea industry. He is one of the well-known senior advisors in the tea extension field in Sri Lanka and he has more than 34 years active experience in the tea industry.He is currently working as the coordinating secretary of the hon irrigation minister*

***Dr. G.G. Bandula***

Sri Lankan tea industry has recorded better performance during the year 2021 over the corresponding period of 2020 despite the many challenges and issues faced by the stakeholders.

### Tea Production In 2021

Total tea production of Sri Lanka for the year 2021 has been reported as 299.34 million kgs, recording a gain of 20.49 million kgs vis-à-vis 278.85 million kgs of 2020. On a cumulative basis, all elevations have shown substantial gains over the corresponding period of 2020.

Interestingly, compared to 300.12 million kgs of January-December 2019, cumulative production of 2021 shows a marginal decrease of 0.78 million kgs. On a cumulative basis, High and Medium elevations have shown gains with the Low Growns showing a decrease by 6.67 million kgs over the corresponding period of 2019.

| Year | Total tea production (million kgs) |
|---|---|
| 2019 | 300.12 |
| 2020 | 278.85 |
| 2021 | 299.34 |

(SLTB)

As usually Sri Lanka mainly produce Orthodox Black Tea, followed by CTC and Green Tea on a very small scale during the year 2021.

The available tea crop figures for the twelve months (January to December 2021) period are appended below (in MT).

| CATEGORY | QUANTITY (MT) |
|---|---|
| Orthodox black tea | 270,571 |
| CTC | 26,195 |
| Green tea | 2,572 |
| Total | 299,338 |

(SLTB)

### Tea Export In 2021

Total tea export of Sri Lanka for the year of 2021 has been reported as 286.02 million kgs, showing an increase of 20.45 million kgs vis-à-vis 265.57 million kgs of January-December 2020. With compared to the total tea export of 292.65 million kgs in 2019, cumulative production of 2021 shows a marginal decrease of over the corresponding period of 2019.

All main categories of exports (Bulk Tea, Tea Bags and Packeted Tea) have shown an increase compared to the corresponding period of 2020.

Revenue of Rs. 263.35 billion received from Tea Exports for January-December 2021 shows an increase of Rs. 33.18 billion in comparison to the Rs. 230.17 billion of January-December 2020. It also surpasses the previous best of Rs. 240.6 billion export income in January-December 2019.

It is about approximately US $ 1.3 billion export earnings by 2021, as against US$ 1.213 billion tea export earnings in 2020.

| Year | Total tea export (million kgs) | Tea export earnings (US$ billion) |
|---|---|---|
| 2020 | 286.02 | 1.3 |
| 2021 | 265.57 | 1.213 |

(SLTB)

FOB value of Rs. 920.76 records an increase of Rs. 54.06 compared to Rs. 866.70 of January-December 2020, thus recording the highest ever FOB value surpassing the previous best which was received during the corresponding period of 2020, whereas in 2019, it was only Rs. 823 per kilo of tea exported. Total Rupee FOB value has increased considerably in 2021, although in USD terms it reflects a marginal decrease.

Tea in Bulk and Packeted Tea FOB values show a marginal negative variance in USD terms, whilst Tea Bags have shown a healthy increase when compared to the corresponding period of 2020.

| Year | FOB value/kg (Rs.) |
|---|---|
| 2020 | 866.70 |
| 2021 | 920.76 |

(SLTB)

Sri Lanka exported mainly, tea packets and bulk tea followed by tea bags and Green tea and Instant tea on a very small scale.

| Description | Quantity Exported In 2021 (MT) | % of the total |
|---|---|---|
| Bulk | 125,388 | 43.8 |
| Tea in Packets | 128,344 | 44.9 |
| Tea In Bags | 24,665 | 8.6 |
| Instant Tea | 3,032 | 1.1 |
| Green Tea | 4,587 | 1.6 |
| TOTAL | 286,016 | 100 |

(SLTB)

Iraq has emerged as the No. 1 major importer of Ceylon Tea following an increase of 27% YoY in January-December 2021. Turkey has moved down to the No. 2 position with a decline in imports (23.5% YoY) followed by Russia, which has also declined (7.6% YoY). The U.A.E. has moved up to the 4th position having increased imports significantly (167% YoY). Iran, which has moved down by a position to the 5th shows a marginal gain (4.7% YoY) in imports during January-December 2021. Other notable importers are China, Libya, Azerbaijan Chile and Syria. Meanwhile, destinations such as Chile, Syria and Saudi Arabia have recorded a decrease in imports during the period under review. It is noteworthy that imports to Libya and Japan have increased significantly YoY by 58% and 17% respectively.

**Major Importers Of Sri Lankan Tea In 2020 And 2021 - In Mt**

| COUNTRY | 2021 | 2020 |
|---|---|---|
| IRAQ | 42,455 | 33,377 |
| TURKEY | 29,741 | 38,866 |
| RUSSIA | 27,356 | 29,608 |
| U.A.E. | 23,149 | 8,670 |
| IRAN | 15,833 | 15,127 |
| CHINA | 14,237 | 14,123 |
| LIBYA | 12,339 | 7,806 |
| AZERBAIJAN | 10,591 | 10,303 |
| CHILE | 8,834 | 9,419 |
| SYRIA | 7,779 | 9,536 |

(Source – Forbes and Walker Tea Brokers)

The negative side is that our productivity of tea has been declining over a period of time; this is due to lack of tea replanting & infilling undertaken and the producers' inability to address climate change effects and other factors, as there has been a gradual erosion of soil and land degradation, despite application of fertilizer.

The cost of production of tea has also been increasing due to many factors which includes low productivity, both land and labour, high overheads and adverse impact of climate change and Covid-19.

TEA SMALLHOLDINGS SECTOR IN SRI LANKA:

There are over 450,000 Tea Small Holders with 1.5 million dependents operating with nearly 60 percent of the total tea land extent in the Island. The tea smallholdings sector has contributed nearly 75 percent to the total tea production annually and this sub sector produced 223 million kgs of made tea (74.5%of the total) out of the total tea production of 299.34 million kgs in the country during the year 2021. Therefore, this sub sector can be identified as the backbone of the tea industry in Sri Lanka.

WAY FORWARD:

The Government of Sri Lanka totally banned import of chemical fertilizer and herbicides in 2021 to promote and encourage organic agriculture to go for the environment friendly green agriculture.

Due to the withdrawal of chemical fertilizer in and around mid-2021, its ill effects in the tea industry which are likely to take its toll in first quarter of 2022. Since the Government has recently reversed the ban on chemical fertilizer some degree of recovery is anticipated commencing second quarter of 2022, subject to extreme weather conditions not being a reality. However, ageing tea bushes and low productivity levels and low application of fertilizer due to the removal of fertilizer subsidy by the government continue to be a downside.

The government of Sri Lanka has taken several steps to develop the tea industry on sustainable manner. The government tea subsidies for planting of tea have been increased in 2021 and tea replanting subsidy has been increased up to Rs. 630,000 from Rs. 500,000/ha and tea new planting increased up to Rs. 500,000/ha from Rs. 400,000/ha and supply of vacancies subsidy is given at the rate of Rs. 100 per plant to encourage the tea smallholders to develop their lands.

In addition, the monthly allowance of Rs.5, 000 is given for a period of 24 months to compensate for income loss during the re planting process for the low income tea smallholder families. The measures have also taken to provide facilities and assistance such as supply of quality plants, the subsidies for establishing micro irrigation systems and to provide machineries and new technology and additional income sources for low income tea smallholder families etc during the year 2021.

The Sri Lanka Tea Board also focused more on the front end of the value chain by implementing the already approved promotional activities under Ceylon Tea global campaign coupled with aggressive marketing strategy formulated and to reinforce the brand story that the cleanest tea in the world through maintaining minimal level of chemical residues and demonstrating sustainable credentials including purity and wellness factor of Ceylon Tea with the support of all the industry stakeholders' participation

Therefore, the future of the tea industry will be better with the intervention of the government of Sri Lanka.

拉赫马特 . 巴德鲁丁 出生于印尼的茶叶之乡—— 西爪哇省万隆市，万隆市的茶叶产量占全印尼产量的 75% 以上。1965 年，拉赫马特开启了他的职业生涯。在经过实习和培训后，巴德鲁丁就职于美国纽约 C.Tennant & Son 公司的商品贸易部，该公司后来被瑞士嘉吉公司收购。拉赫马特目前担任 PT. Kabepe Chakra 公司董事长一职。Kabepe Chakra 是一家从事茶叶贸易的集团公司。拉赫马特的父亲哈吉 . 巴德鲁丁在 1956 年从一家叫做 Tiedeman van Kerchem 的荷兰公司购入了 Dewata 茶园，也就是如今 Kabepe Chakra 集团公司的雏型，该公司在西爪哇和苏门答腊拥有 6 个茶庄，为扩大公司经营范围，现在已经进军加里曼丹西部的棕榈油种植园。过去 10 年来，PT KBP Chakra 与茶园周围的茶叶小生产者建立了以“社会创业者”为基础的紧密关系，并作为公司扩展战略的一部分。2010 到 2017 年间，拉赫马特担任印度尼西亚茶叶局局长一职。此前，拉赫马特分别于 1994 至 1998 年，1998 至 2003 年先后两届出任印度尼西亚茶叶协会主席，且于 1993 年到 1998 年出任印尼绿茶合作社主席一职。拉赫马特于 1961 到 1962 年参加了 AFS 交换生项目，就读于美国康涅狄格州东温莎高中，随后在印度尼西亚万隆纺织学院学习。

**拉赫马特 . 巴德鲁丁**

# 2021 年印度尼西亚茶叶行业概况

疫情对全球经济产生了负面影响，其中也包括茶叶行业。令人惊讶的是，一些生产国的茶叶生产和销售数据并没有受到太严重的影响。

然而，在印度尼西亚，大多数茶商仍在努力维持生计，而疫情更是加剧了这种情况。

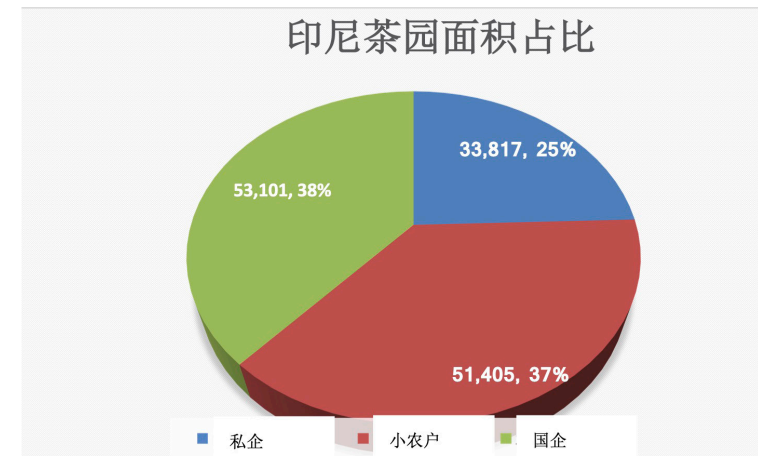

来源：印度尼西亚农业部地产总局

茶园用地面积正在减少，发生这种情况有几个原因，例如由于对茶叶初级产品的监管而导致的土地转换，这使得茶农的积极性降低。

少数茶农为了满足粮食消费需求，将土地改造成了粮食作物用地。

茶叶生产者有三类，国有企业、私营企业和小农。茶叶小农的茶园几乎和国有企业一样大，但其产量却只占全国总量的 25%。

尽管如此，小农户对变化的适应性更强，他们能比其他人更好地生存下来。那主要是因为小农户的生产成本更加灵活，而且不像其他两个必须遵守政府制定的最低工资法规的群体，工资并没有严格地计入他们的成本。




来源： PTPN 8

在这个竞争激烈的行业中，小农户可能是建立商业伙伴关系的潜在对象，当然这取决于你怎么看待它。小农户与当地或国际准合作伙伴携手合作，可以弥补自身的不足，让他们更好的满足当今世界新市场需求。更好的质量，遵循认证机构的要求，现在似乎仍然是贸易的一部分。

印度尼西亚人口目前约为 2.78 亿人，是一个尚未开发、且利润丰厚的市场。

印度尼西亚茶叶消费的趋势没有增加，培养优质茶叶仍然存在障碍。

印尼人均茶叶消费量仅为约 350 克，而其他一些生产国为 1,000 克或更多。为了在全球做大市场，茶叶确实需要更积极的推广，在此过程中，我们应该更充分的利用许多茶叶好的方面，以满足不断变化的消费者行为，特别是千禧一代，他们现在可能是一个重要的决定性群体。

缺乏推广是印尼茶叶消费无法上涨的主要因素之一。虽然有推广，但尚未系统化，没有具有良好规划和策略的大型计划。

在印度尼西亚，推广茶叶的仍然是个人，以及生产包装茶叶产品公司。

为了在世界饮料“喉咙份额”竞争中生存下来，现在是时候让全球茶叶同行们共同合作，所有人都要在一个阵营中，共同面对挑战，而不是单打独斗。他们应该共同决定目标，如何保持茶是仅次于水的第二大饮料的声誉，并让茶更受世人尊敬。

茶叶属于 FAO/IGG 茶叶工作组的分管范围，该工作组容纳了消费国和生产国，我们应该让它更有益于成员国的发展。咖啡或可可等其他作物有 ICO 和 ICCO 组织，其成员仅由生产国组成，消费国不在其列。FAO/IGG 茶叶工作组应与每个生产国的茶叶委员会一道，寻求其政府的更多支持。茶叶需要好的通用推广才能使市场变得更大。

除了上述的 FAO/IGG 茶叶工作组之外，全球茶叶行业还有一个潜在的强大工具，即 CITS（国际茶叶小生产者联盟）。CITS 是一个非营利性非政府组织，经过在 FAO/IGG/ 工作组的几次会议上的积极讨论后，以及在粮农组织的支持下，以促进茶叶小农在残酷的市场竞争中更好地生存，否则全球茶叶行业的可持续性可能受到威胁。

全球茶叶小农占 70% 的茶园面积，占总产量的 60%。如果平均每个小农只有 0.8 公顷至 10 公顷的茶园，却无法维持他们的生活，那么从长远来看，全球茶叶产业只是貌似繁荣实则不然。

以下是关于印度尼西亚茶叶的事实和数字。印尼曾经是一个重要的茶叶生产国，现在正在尽最大努力卷土重来。

| 年份 | 生产 | 出口 | | 进口 | |
|---|---|---|---|---|---|
| | 单位：吨 | 单位：吨 | 千美元 | 单位：吨 | 千美元 |
| 2021 *) | 129,529 | 45,500 | 96,500 | 10,873 | 23,220 |
| 2020 | 128,016 | 45,267 | 96,325 | 14,909 | 25,857 |
| 2019 | 129,832 | 42,811 | 92,347 | 16,326 | 36,037 |
| 2018 | 140,236 | 49,038 | 108,451 | 14,922 | 29,430 |
| 2017 | 146,251 | 54,194 | 114,232 | 14,679 | 26,223 |

来源：Source : Directorate General of Estate, Ministry of Agriculture of Rep. Indonesia（印度尼西亚农业部地产总局）
*) 初步数据，有待确认

## 生产

与 2020 年相比，2021 年的产量仅增长了 1%，即从 2020 年的 128,016 吨增加到 2021 年的 129,529 吨。这些数字显示了疫情期间印尼茶叶产业的停滞状况。


Source : Directorate General of Estate, Ministry of Agriculture of Rep. Indonesia.
数据来源：印尼农业局地产总局

预计 2022 年的产量将随着茶园生产率的提高而略有增加。

## 出口

2020 年出口量较 2019 年增长 6%，从 42,811 吨增至 45,265 吨。同时，出口额也增长了 4%，从 92,347,332 美元增长到 96,325,235 美元。

由于疫情的影响，2021 年的出口将略有下降，据估计，印度尼西亚出口到其他国家会面临船舶短缺问题。

由于疫情，印尼茶叶贸易的主要困难在于物流方面。检疫、海关、港口和航运公司的运营速度都慢于其正常效率。

## 进口

2020 年的进口量与 2019 年相比下降了 9%，即从 16,326 吨降至 14,909 吨。与此同时，进口额大幅下降 28%，从 36,036,711 美元降至 25,856,745 美元。

由于疫情带来的健康问题，2021 年的茶叶进口停滞或略有增加，与印尼茶叶消费量的增长一致。

**Rachmat Badruddin**

*He was born in Bandung, West Java Province, the home of Indonesian tea as more than 75% of the national tea production is produced there. He started his working experience early when in 1965 (till 1968), after completing an internship and a traineeship, he worked at the Commodity Trading Division of C. Tennant & Son, New York, USA, who later was acquired by Cargill of Switzerland.*

*Currently Mr Badruddin is the President Director of PT. Kabepe Chakra, a group of companies actively in Tea Trading.*

*In 1956, his late father, Haji Badruddin, bought a tea plantation called Dewata from a Dutch company, Tiedeman van Kerchem, which was the embryo of the now Kabepe Chakra group of companies which owned 6 tea estates in West Java and Sumatra, and started to venture into Palm Oil plantation in West Kalimantan, to diverse its activities.*

*PT KBP Chakra had for the last 10 years built close relationship with the small tea growers surrounding their tea estates on a 'socio entrepreneurial' basis and was adopted as the company's strategy in its expansion program.*

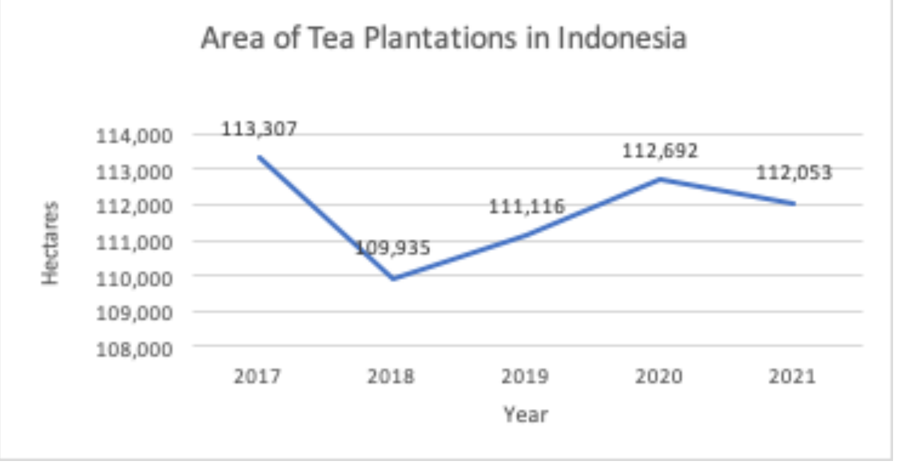
*From the year of 2010 to 2017, Mr. Badruddin chaired the Indonesia Tea Board, and he was Chairman of Indonesia Tea Association for two terms (1994 to 1998 and 1998 to 2003), and in 1993 to 1998 was Chairman of the Indonesian Green Tea Cooperative.*

*He in 1961-1962 participated in the American Field Service (AFS) Exchange Student Program, attending Senior High School in East Windsor, Connecticut, USA and afterward studied at Textile Institute, Bandung, Indonesia.*

# Overview of Indonesia's Tea Industry in 2021

The Covid-19 pandemic has impacted negatively the global economy and tea industry is not excluded. Tea production and sales figures in some producing countries surprisingly are not too badly affected though.

In Indonesia however, the tea producers which mostly still struggling to make ends meet, the pandemic had exacerbated the situation.




Source : Directorate General of Estate, Ministry of Agriculture of Rep. Indonesia.

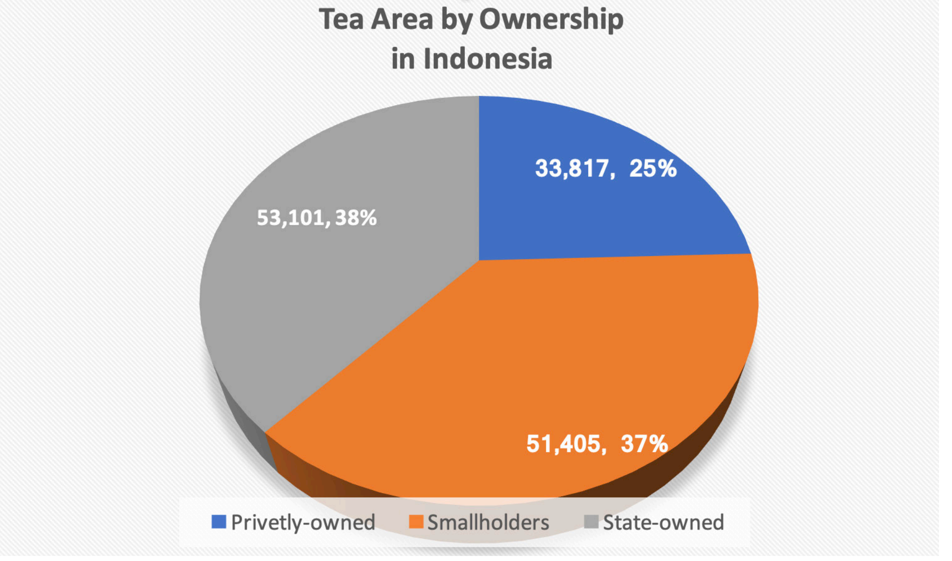
The area of land used for tea plantations is decreasing.

This happened for several reasons, such as land conversion due to regulation on primary products for tea which made tea farmers less motivated.

A small number of tea farmers has converted their lands into food crops to meet their food consumption needs.

There are three groups of tea producer, the State-owned companies, Private's, and Smallholders. The Tea Smallholders' area is almost as big as the State-owned companies, but its production contribution the national figure is only 25%.

Nevertheless, the smallholder is more adaptive to change, they have survived better the situation than the others. It's mainly because that the Smallholders' cost of production is more flexible since the wage is not factored in their cost as strictly as it is the case with the other two groups who have to follow the minimum wages regulation set by the Government.




Source : PTPN 8

Depend on how you look at it, but the Smallholders could pose as disguised opportunities to create business partnership in this competitive industry. Hand in hand with local or international partner-to-be, the Smallholders can strengthen their shortcomings in meeting the nowadays world's new market requirements. Better quality, to follow Certification Bodies requirements which now seem to stay as part of the trade.

The Indonesian population which presently is around 278 Millions people is an untapped lucrative market.

The Trend of Tea Consumption in Indonesia has not been increasing, there is still barriers to educate a good quality of Tea.

Its per capita consumption is only about 350 grams compare to 1,000 grams or more in some other producing countries. To make the market bigger in the global scene, Tea do need more aggressive promotion. The many noble aspects of Tea should be more capitalized in promotion, to meet the changing consumers behaviour especially the millennials which now seem to be an important deciding group.

Lack of promotion is one of the main factors for tea consumption in Indonesia, which has not increased.

The promotion has been carried out, but has not been systematic and has become a large program that has good planning and strategy.

Tea promotion in Indonesia is still carried out by individuals and companies that have packaged tea products.

To survive the world's beverage cut throat competition, it's high time for the global Tea players to hold hand together, to collaborate and all are to be in one camp and face the challenges jointly rather than singly. They should decide together their common goal, how to keep the reputation that Tea is the second largest beverage drunk after water, and to position Tea in a more respectable place in the world fora.

The fact that Tea do belong to the Working Group of the IGG/FAO which housed both the consuming and producing countries should be made more beneficial to its member countries. Other crops such as Coffee or Cocoa has the ICO and ICCO organization its members consist only the producing countries which put the consuming countries across the table. The FAO/IGG WG on Tea in tandem with Tea Board of Tea in each producing countries should sought more support from its Government. Tea needs good generic promotion to make the market bigger.

Aside of the FAO/IGG Working Group on Tea mentioned above, there is a potentially strong vehicle the global tea industry has, i.e. the CITS (the Confederation of International Tea Smallholders). The CITS baby, a non profit NGO which was delivered under the auspices of the FAO after it was actively discussed at several FAO/IGG/WG meetings, to facilitate the Tea Smallholders to survive better in the ruthless market competition failing which the global Tea industry's sustainability could be at stake.

The global Tea Smallholders occupy 70 % area, and is responsible to about 60% of production. If the Smallholders which occupy average between 0.8 Ha to 10 Ha per farmer cannot support their lives, then the prosperity of the global Tea industry is more seemingly than real in the long run.

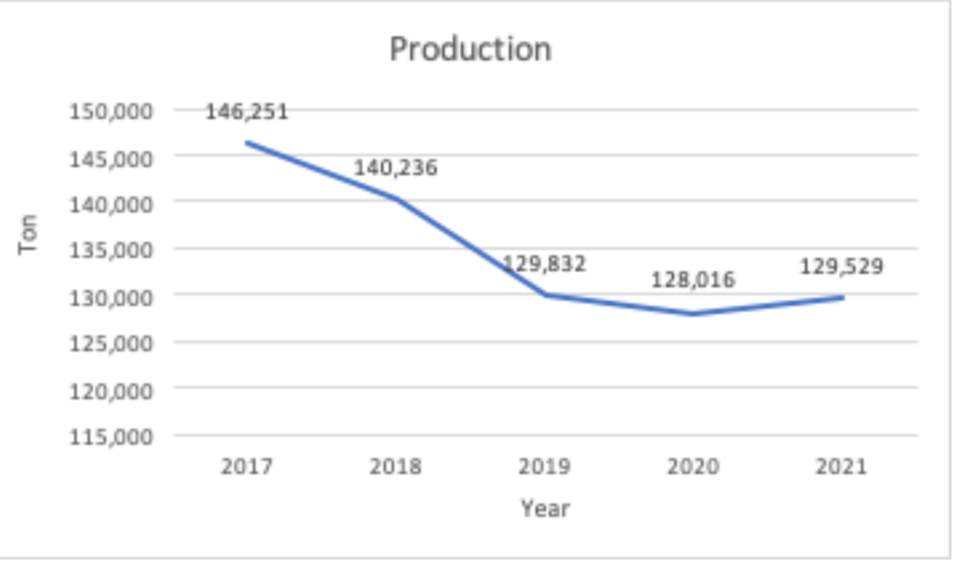
Now allow us to share some fact and figures on Indonesian Tea figures who once was a more important producing Tea producing country and now is trying its best to make a come back.

| Year | Production | Export | | Import | |
|---|---|---|---|---|---|
| | Vol. Tons | Vol. Tons | USD (000) | Vol. Tons | USD (000) |
| 2021 *) | 129,529 | 45,500 | 96,500 | 10,873 | 23,220 |
| 2020 | 128,016 | 45,267 | 96,325 | 14,909 | 25,857 |
| 2019 | 129,832 | 42,811 | 92,347 | 16,326 | 36,037 |
| 2018 | 140,236 | 49,038 | 108,451 | 14,922 | 29,430 |
| 2017 | 146,251 | 54,194 | 114,232 | 14,679 | 26,223 |

Source : Directorate General of Estate, Ministry of Agriculture of Rep. Indonesia
*) Preliminary, subject to confirmation

**Production**

Production in 2021 increased only 1 % compared to 2020, or from 128,016 Tons in 2020 to 129,529 tons in 2021. These figures show the stagnant condition of the Indonesian tea industry during the pandemic.




Source : Directorate General of Estate, Ministry of Agriculture of Rep. Indonesia.

The projection of production in 2022 is estimated to increase slightly in line with efforts to strengthen and increase plantation productivity.

**EXPORT**

The export volume in 2020 increased 6% compared to 2019, or from 42,811 tons to 45,265 tons. Meanwhile, the export value also rose 4%, or from USD 92,347,332 to USD 96,325,235.

The export in 2021 to decline slightly due to the impact of the Covid-19 pandemic, where it is estimated that there will be obstacles to the availability of shipping from Indonesia to export destination countries.

The main difficulties of the Indonesian tea trade due to the Covid-19 are on the logistics side. Quarantine, customs, port, and shipping companies all are operating slower than their normal efficiency.

**IMPORT**

The Import volume in 2020 shows the opposite is down 9% compared to 2019, or from 16,326 tons to 14,909 tons. Meanwhile, the decline in import value was quite sharp, 28%, or from USD 36,036,711 to USD 25,856,745.

The imports in 2021 is stagnant or slightly increase in line with the increase in Indonesian tea consumption due to health issues related to the covid-19 pandemic.

自 2010 年以来，洪婉安女士出任茶叶市场发展与研究中心主任、越南纺织服装协会（VITAS）主席以及越南茶叶协会副主席等职位。洪婉安女士拥有超过 8 年的贸促工作经验，已为越南茶叶市场组织了超过 36 个贸促项目，管理 VITAS 贸促项目，负责资源配置，规划与决策等。

此外，洪婉安女士曾负责带团赴新加坡、澳大利亚、中国、日本、泰国、俄罗斯和瑞士等国参加国际博览与展览会。

洪婉安女士在设立越南国家茶业商标“Cheviet”，协助其在国内外注册事宜、安排大众媒体（BBC，泰国和俄罗斯越南新闻社、VOV 和 VTV）的推广工作方面发挥了重要作用。

洪婉安女士在业内很有声望，且经验丰富，因此也同时出任越南茶叶公司的进出口顾问一职。

洪婉安女士目前的头衔为越南茶叶协会副主席。

洪婉安

# 越南茶产业
# ——2021 年概况，2022 年发展方向

## 2021 年概况

2021 年仍是受新冠肺炎疫情影响的一年，越南茶产业遭遇重重困难。茶叶企业在气候变化和产量下降的背景下运营。运费不断上涨并居高不下，集装箱始终短缺。社交距离和隔离政策一直在阻碍和中断货物运输。

高昂的原材料价格和抗疫政策给企业带来了诸多困难。由于出口困难，库存不断增加。由于作物转换，茶树种植面积一直在缩小。企业不再继续投资扩大生产。

部分产茶区出现异常气候变化，严重影响茶芽产量和品质。

## 我们为应对困难做了什么？

政府和各部门、地方政府提供解决方案来支持茶企，帮助他们克服困难。

茶企主动调整经营策略和计划，确保茶叶产量。

茶企转型开发国内市场。健康茶产品一直备受关注，因此国内茶产品日益多样化，满足消费者的需求。

越南茶叶协会与其他国际和国内组织合作，实施了可持续发展计划，如产品单位代码、农业团队模式。

越南茶叶协会定期为企业、合作社、茶社、饮茶爱好者组织线上和线下培训班，科普与茶相关的基础知识、历史、品茶与泡茶技艺等。

全国茶叶贸易促进计划转为线上进行，取得巨大成功。

## 2021 年越南茶叶产量：

- 产量：180,000 吨
-2020 年库存：15,000 吨
- 官方出口：130,000 吨
- 边境出口：15,000 吨
- 产品比例：红茶 51%，绿茶 48%，其他 1%
-2021 年库存：20,000 吨
- 内部消耗：45,000 吨

目的国 / 地区出口量排名

| 排名 | 国家和地区 | 数量（公吨） |
|---|---|---|
| 1 | 巴基斯坦 | 38,300 |
| 2 | 中国台湾 | 17,200 |
| 3 | 俄罗斯 | 11,200 |
| 4 | 中国 | 8,700 |
| 5 | 伊拉克 | 6,000 |
| 6 | 印度尼西亚 | 5,600 |
| 7 | 美国 | 5,800 |
| 8 | 印度 | 4,000 |
| 9 | 马来西亚 | 3,600 |

## 2022 年发展方向

2022 年，新冠肺炎疫情仍然难以预测。全球市场可能出现波动，将严重影响越南茶叶生产和出口企业的产销状况。

茶产业仍将保持目前的产量和面积：18 万吨干茶产量以及 13 万公顷种植面积。茶产业将重点开展以下活动：

- 继续支持企业申请可持续茶叶生产证书。
- 鼓励有条件的企业以合理规模生产有机茶，特别是扩大雪山茶的生产规模。
- 继续支持和开发茶叶生产单位代码计划。
- 应用重点：农业机械化、有机肥、微生物的生产和使用；使用生物杀虫剂；增加茶产品的附加值；茶产业与生态旅游业相结合。
- 与茶叶公私合作伙伴（PPP）组织内的各方协调，推动务实合作，支持茶产业的可持续发展。

*Ms Nguyen Anh Hong became Director of Center for Tea Market Development and Research, VITAS and Vice Chairwoman of Vietnam Tea Association since 2010.*

*With more than eights years of working in trade promotion, she has organized more than 36 trade promotion programs for Vietnam tea industry, Manage the trade promotion programs of VITAS including allocate resources, make plan and make final decision, etc..*

*Ms Nguyen Anh Hong also responsible for leading delegation to attend international expo and exhibition in Singapore, Australia, China, Japan, Thailand, Russia Federation, Swiss.*

*She took an important role in stablish the national trademark "Cheviet" for Vietnam tea industry, register the trademark domestically and internationally, popularize it on mass media like BBC, Vietnam News Agency in Thailand and Russia, VOV and VTV...*

*Ms Nguyen Anh Hong also works as export-import consultant for tea companies in Vietnam due to her high reputation in this fied as well as a long list of experiences she gained.*

*Her current title is Vice Chairwoman of Vietnam tea Association.*

***Nguyen Anh Hong***

# Vietnam Tea
# Overview 2021 Development Direction 2022

**Overview 2021**

2021 continues to be a year hardly affected by the Covid epidemic, Vietnam tea industry encountered numerous difficulties. Tea businesses run in addition with the climate changes and production decreases. Freight rates has been constantly increasing and keeping high, container shortages have persisted, with no end. Social distancing and isolation have been tackling and interrupting the transportation of goods.

The high price of input materials and the anti-epidemic directives caused many difficulties for businesses. Inventories increased due to difficulties in exporting. The tea area have been shrinking due to crops conversion. Enterprises did not reinvest to expand production.

Some tea areas reported abnormal weather changes which affected the output and quality of tea buds heavily.

**What we have done to overcome difficulties?**

The Government and Ministries, local authorities have appropriate solutions to support and overcome difficulties for tea businesses.

Tea enterprises proactively adapt their own measures and plans to maintain production

Tea enterprises shifted to develop domestic products. Healthy tea products have been interested, so domestic tea products are increasingly diversified, meeting the needs of consumers.

Vietnam Tea Association, in associated with other international and domestic organization, have implement sustainable development programs such as Product Unit Code, Agricultural Team Model,

Vietnam Tea Association regularly organized online and offline training classes on tea basics, tea history, tea tasting, tea brewing and tea enjoying for businesses, cooperatives, tea clubs, tea lovers.

The National Trade Promotion Program for tea were shifted to online status and achieved great success.

**Vietnam Tea Production 2021:**

- Production: 180,000 tons.
- Inventories in 2020: 15,000 tons
- Official export: 130,000 tons.
- Border export: 15,000 tons.
- Product scale: 51% black tea, 48% green tea and 1% other tea.
- Inventories 2021: 20,000 tons.
- Internal consumption: 45,000 tons.

**Top exports by Country of Destination**

| Index | Countries and territory | Quantity (Thousand MT) |
|---|---|---|
| 1 | Pakistan | 38.3 |
| 2 | Taiwan | 17.2 |
| 3 | Russia | 11.2 |
| 4 | China | 8.7 |
| 5 | Iraq | 6.0 |
| 6 | Indonesia | 5.6 |
| 7 | USA | 5.8 |
| 8 | India | 4.0 |
| 9 | Malaysia | 3.6 |

(Source – Forbes and Walker Tea Brokers)

**Development Direction 2022**

In 2022, the Covid-19 epidemic continues to be unpredictable. There will be many fluctuations in the world market, which will significantly affect the production and consumption of Vietnam's tea producing and exporting enterprises.

Tea industry still maintains the current output and area: 180,000 tons of dry tea and 130,000 hectares. Tea industry will focus on the following activities:

- Continue to support businesses to apply sustainable tea production certificates.
- Encourage businesses that are qualified to produce organic tea at a reasonable scale, especially Snow Shan tea production units.
- Continue to support and develop Tea Production Unit Code program.
- Focus on application: mechanization in agriculture, production and use of organic fertilizers, microorganisms; use of biological pesticides; increase added value for tea products; Tea business combined with eco-tourism.
- Coordinate with parties in the tea Public private partner (PPP) group to promote effective activities to support tea industry to develop sustainably.

刘培锋，泰国茶会主席。泰国茶会的使命是向泰国人民传授与茶叶相关的知识，比如茶文化、茶叶历史和茶的科学功效。此外，泰国茶会努力支持和推动泰国的茶叶产业经济。现在，我们有16,000多名成员，包括茶叶消费者、茶叶工厂、茶叶店、茶叶研究所和政府部门。泰国茶会促进泰国茶叶行业同海外的联系，帮助泰国茶叶走向国际市场，提高茶农的生活质量。微信：steven_liu66

刘培锋

# 泰国的茶叶生产

泰国是东盟地区第四大茶叶生产国，仅次于越南、印度尼西亚和缅甸。泰国最大的茶树种植区在北部，包括茶叶产量最高的清迈和清莱，以及难府和夜丰颂等地区。泰国茶叶产量的年增长率在15%左右，2020年其产量约为29,000吨，其中27,000吨来自阿萨姆种，另外2,000多吨来自中国种，产品大多为红茶。预计到2021年底，泰国茶叶产量将达到33,000吨。

## 茶叶进出口统计

### 进口数据

2020年全年泰国茶叶进口额约为2550万美元，高于2019年约15%的增幅。泰国主要从中国、越南、缅甸和印度尼西亚进口茶叶，其中从中国进口的茶叶约占全部进口的47%。2020年来自中国的茶叶进口额超过1,220万美元。

### 出口数据

2020年全年，泰国对印度尼西亚、柬埔寨、中国、美国、越南和老挝等新兴市场的茶叶出口额约为2,300万美元。以老挝为例，泰国对该国的出口额增幅最高，从2019年的20万美元增加到2020年的950万美元，被认为是泰国茶叶出口的一个重要新兴市场。同时，对印度尼西亚的出口额从2019年的720万美元骤降到2020年的250万美元，这可能是疫情封锁期间运输不便带来的问题。其他茶叶产品，如速溶茶、茶粉等，2020年出口8,000多吨，出口额约3,100万美元。

根据进出口统计，我们可以得出结论，泰国的茶产业价值比2019年增长了10%以上。尽管在2020年经历了新冠肺炎疫情，泰国的茶产业仍然向好。

## 茶园

在泰国，茶树的种植方式可分为两种，一种是在山坡上成排种植，另一种是让茶树在野外自然生长。想必大家更熟悉第一种种植方式。然而，任其自然生长的种植方式却更适用于树龄几百年以上的阿萨姆茶树。

## 泰国的茶旅行业

泰国政府机构正在和农民开展合作，尤其是泰国旅游局正致力于推动与茶产业相关的旅游业。这类旅游在疫情前很受欢迎，但在疫情期间旅行限制和防疫形势不断升级的背景下，过去两年旅游业发展停滞不前。但在不久的将来，当地计划推出开放式体验游，让茶叶爱好者来到茶园，亲身体验制茶过程，这种旅游形式将会大受欢迎。

## 茶产业的发展趋势

泰国茶叶市场80%以上是家庭饮用。因此，当疫情开始时，人们不得不在家工作，促进了茶叶市场的扩张。人们都在居家隔离，他们喝茶更多，也更需要了解茶叶。疫情期间，他们以饮茶来放松，有些人也通过饮茶来寻找新的体验。新的饮茶者很容易接受新事物。因此，新茶如普洱茶、拼配茶和珍珠奶茶，甚至是康普茶，都发展了自己的市场，并获得了令人瞩目的增长。

此外，随着泰国多个大城市咖啡店的发展，各家咖啡店之间竞争激烈，而受到疫情的影响，一些咖啡店在这个时候找到了生存之道。此前，大多数创业者都在尝试寻找新的产品来将自己的店铺与同行差异化，而现在茶成为这类店铺感兴趣的饮料，因此他们需要越来越多地了解茶。

根据泰国海关的报告，目前外国茶叶进口量已经飙升至历史新高。特别是进口自中国的茶叶，部分用于咖啡店和茶店，尤其是用于制作珍珠奶茶。由于政府实施的旅行禁令措施非常严格，这对外卖业务来说是一个机会。餐饮外卖平台的数量猛增，外卖成为城市居民新的生活方式。珍珠奶茶商家大量使用外卖服务，所以在疫情来袭的情况下，居家隔离的人仍然可以喝到这种茶和其他茶产品。

## 未来趋势

当前，泰国正处于茶叶时代，越来越多的人对这种饮料产生兴趣。当地和国际投资者通过投资开设了大量茶馆。现在我们有来自中国的茶吧，它在云南非常有名。去年9月，霸王茶姬-在曼谷开业。此外，茶饮的流行带动了很多新的业务，比如探店网红或品茶师，线上和线下茶店遍布全国。关于茶的学术讲座和研讨会以及茶及其衍生品的各种交易会在产茶区和曼谷举行。以上这些确凿的证据表明，泰国的茶产业比过去更活跃。

现在，泰国人民对茶产业的嗅觉更加敏锐，茶产业开始转向大众化，他们注意到茶的健康功能，并且可以抗击流行病。泰国的茶产业在生产、进出口方面将继续扩张，这将推动未来更高的消费率。

## 国际社会

泰国现在已经走向国际寻求合作，并利用论坛展示泰国茶，以在世界舞台上获得更多认可。目前，泰国已与许多与农业和贸易相关的茶叶协会、茶叶研究所、茶叶生产商和政府机构建立了合作关系。希望这将增进人们对泰国茶叶的认识。

*Dittawat Steven Kaewkarnjanadit ( 刘培锋 ) is the Chairman of Tea and Chinese Cultural Appreciation Society of Thailand (TCCAST/ 泰国茶会 ). TCCAST mission is educating Thai people about tea such as tea culture, history and scientific benefits. Moreover, TCCAST try to promote and support tea business in Thailand. Now today we have more than 16,000 members online including tea consumer, tea factory, tea shops, tea institute and government sector. TCCAST facilitate to connecting Thai tea factory with oversea for helping promote Thai tea to international market and improve tea farmer life quality better.*

***Dittawat Kaewkarnjanadit***

# Thailand Tea Production

Thailand is the fourth largest tea producer in the ASEAN region after Vietnam, Indonesia and Myanmar. The country's largest tea-growing region is the northern region, which includes Chiang Mai and Chiang Rai, the most productive, and also other areas such as Nan and Mae Hong Son. Thailand produce tea with a tendency to increase by an average of 15% per year, which in 2020 Thailand produces approximately 29,000 tons divided into the Assamica tea app. 27,000 and Sinensis more than 2,000 tons, the production amount mostly be black tea. We have projected in the end of 2021 production amount will be reach 33,000 tons.

## Tea import and export statistics

### For Import

In 2020 whole year Thailand import value of tea leaves was around 25.5 million U.S. dollars, it's higher than 2019 around 15% growth. Mainly, Thailand import tea from China, Vietnam, Myanmar and Indonesia. Thailand was imported tea from China around 47% from all import amounts. Value of tea import from China was more than 12.2 million U.S. dollars in 2020 .

### For Export

In 2020 whole year Thailand export tea leaves approximately 23 million U.S. dollars to emerging markets as Indonesia, Cambodia, China, United States, Vietnam and Laos PDR. In case of Laos PDR, export value has highest increasing rate from 0.2 million U.S. dollars in 2019 to 9.5 million U.S. dollars in 2020. It was considered as a new important market of tea export of Thailand. On the other hand, the value that we export to Indonesia was declining sharply from 7.2 million U.S. dollars in 2019 to 2.5 million U.S. dollars in 2020 may be the transportation problems between epidemic lockdown period, For other tea products such as instant tea, tea dust etc. Thailand export to the world more than 8,000 tons in 2020 and export value was approximately 31 million U.S. dollars.

For import and export report, we can concluded the Thailand tea industry value increased more than 10 % from 2019 Last year between COVID-19 period 2020 is still be a good year for Thailand tea industry.

## Tea import and export statistics

In Thailand, tea cultivation can be divided into two types. The first is planted in rows on slope of the hillside area and latter is let the tea tree natural grow in the wild environment. Everyone is probably more familiar with the tea plantation picture in the first style. However, allowing the natural growth of tea plants is only seen in old age Assamica tea plants that are hundreds of years old or more.

## Thailand Tea Tourism

From the cooperation of farmers and government agencies, especially the Tourism Authority of Thailand, which is trying to drive tea-related tourism which was very popular in the period before the epidemic but under the travel restrictions and the continual escalation of the situation, the total tourism on these two years was sluggish. But in the nearly future, it is expected that tourism will have an open experience for people who love tea have come to tea plantation and got deeply experience by making their own tea will turn into very popular.

## Tea Trends

Over 80% of the tea market in Thailand belongs to the at-home drinking. Therefore, when the lock down begins, people need to compulsory work at home so, its help the tea market to huge expands. People all stay at home, they drink more tea and the need to learn about it. They use tea for relaxing in that time, some searching for new experiences by drink tea. The new face tea drinkers are easily open to new things. As a result, new teas such as Pu-erh tea and blended teas and Bubble tea, even Kombucha tea, these all have their own markets and got the interesting growth prospects.

In addition, Along with the growth of the coffee shop in many big cities in Thailand for many years, it has been affected by the epidemic lock down. Its makes coffee shops that are already highly competitive businesses to finding survival way at this time. As a result, most entrepreneurs are trying to find new products to make differentiations to their own stores and tea is the beverage that these kinds of stores are interested in. so they need to learn about tea more and more.

According to Thai customs report, the volume of foreign tea imports has skyrocketed to a record high. Especially from China which is partly used in coffee shops and tea shops, especially use in pearl milk tea business. Since the travel ban measures imposed by the government are very strict, it is an opportunity for food delivery businesses. The number of food and beverage delivery agents has soared to become a new way of life for urban people. The pearl milk tea is businesses that uses this delivery services in large quantities, so while the epidemic strikes, people who stay at home can still drink this kind of tea and other tea products.

## Future trends

At this time, Thailand is in the age of tea. More and more people became interested in this drink. Many tea café has been opened by investing from both local and international investors. Now we have the new comer tea café from China, that is very famous tea brand from Yunnan, Ba Wang Cha Ji was opened in Bangkok since September last year, In addition, the popularity of tea drinks has caused many new businesses such as, influencer or reviewer, online tea store and tea shops occurs all over the country. The academic lectures and workshop on tea and various fairs about tea and their derivatives d have to been held both in tea plantation areas and in Bangkok also, for these solid evidences shows Thailand is very active in tea more than in the past

Thai people feel more alert about tea in this time and began to turn to the popularity and they are focusing on the health benefits of tea to fighting with epidemic. Thailand tea industry, in terms of production, Imports and exports will continue to expand. This will drive much higher consumption rates in the future.

## International society

Thailand has now gone international in search of cooperation and used those forums to present Thai tea to gain more recognition on the world stage. Currently, Thailand has established relationships with many tea associations, tea institute, tea factory and government agency that related on agriculture and trade. Hopefully this will raise awareness about tea from Thailand.

刘俊光｜马来西亚茶业商会会长

刘俊光出生于马来西亚吉隆坡。1981 年毕业于英国苏格兰丹迪大学土木工程系，拥有国际认可的专业注册工程师执照。1988 年，刘俊光加入创办于 1928 年的家族企业——马来西亚广汇丰茶行有限公司，成为广汇丰茶行第四代掌舵人之一。他和伙伴携手大事改革经营和管理方针、扩展茶行规模，并致力和世界多个主要产茶国如中国、印度尼西亚、斯里兰卡、印度、肯尼亚、阿根廷等贸易往来，专事特种名茶、红茶茶粉、中国茶叶、中国茶具等等。

刘俊光于 2002 年加入马来西亚茶业商会中央理事会，2005 年出任副会长，2012 年升任会长，2016 年退居署理会长。十多年来，他积极促进和推动马来西亚与全世界的茶叶贸易，带领马来西亚茶商团队参与国际茶事活动、参观茶园和茶厂，在国内策划举办 2014 年、2017 年“马来西亚国际茶与咖啡博览会”以及 2014 年、2015 年“马来西亚茶业商会茶叶杯拉茶比赛”等活动，筹划创办马来西亚茶业商会会刊《茶事茶味》等，为茶业界贡献了一份股肱之力量。

刘俊光

# 马来西亚茶业概况

马来西亚与其说是茶叶生产国，不如说是茶叶消费国。国内产量保持在 330 万公斤不变，而我们从近 20 个茶叶生产国进口约 2,800 万公斤。马来西亚的消费量一直在增长，但由于新冠肺炎疫情，在 2021 年没有增长。马来西亚人均茶叶消费量接近 1 公斤。

马来西亚喝所有类型的中国茶。然而，拉茶（Teh Tarik）是一种加了牛奶和糖的红茶，它的消费量几乎占到茶叶消费量的 80%。红茶、绿茶和乌龙茶市场销售额的比例是 77：1：12。普洱茶和白茶市场的规模不到 1,000 万林吉特，不到茶叶市场总量的 3%。这就是为什么我们认为这个细分市场微不足道。

由于运费增加，林吉特 (MYR) 贬值等原因，2021 年的红茶，绿茶和乌龙茶平均价格与 2020 年相比有所上涨。

人们主要在家外喝茶，但在疫情爆发后，茶叶家庭消费量似乎正在加速。

2021 年，茶和茶饮料的总零售市场规模约为 3.9 亿林吉特。我们目前的估计零售与非零售销售总量的比例约为 20：80 左右。

茶叶在整个类别中占主导地位，因为与茶饮料相比，它更便宜。我们认为，由于疫情，2021 年的销售额和销量增长与 2020 年相同。





马来西亚茶叶进口

来源国

单位：吨　　来源: 马来西亚统计局

| | 印尼 | 越南 | 中国 | 斯里兰卡 | 印度 | 巴布亚新几内亚 | 澳大利亚 | 其他亚洲国家 | 其他 | 总计 |
|---|---|---|---|---|---|---|---|---|---|---|
| **2001** | 8,083 | 75 | 1,424 | 212 | 244 | 26 | 109 | 714 | 259 | **11,146** |
| 2002 | 7,788 | 42 | 1,426 | 289 | 254 | 38 | 36 | 845 | 102 | 10,820 |
| 2003 | 8,564 | 1,032 | 1,392 | 457 | 213 | 264 | 219 | 344 | 181 | 12,666 |
| 2004 | 10,023 | 1,027 | 976 | 465 | 79 | 15 | 379 | 236 | 454 | 13,654 |
| 2005 | 9,543 | 1,609 | 1,718 | 517 | 159 | 90 | 382 | 405 | 523 | 14,946 |
| 2006 | 8,177 | 2,234 | 1,928 | 597 | 441 | 114 | 240 | 506 | 502 | 14,739 |
| 2007 | 8,542 | 2,274 | 2,430 | 637 | 661 | 210 | 167 | 199 | 534 | 15,654 |
| 2008 | 7,668 | 1,520 | 1,833 | 583 | 122 | 336 | 200 | 662 | 637 | 13,561 |
| 2009 | 7,586 | 3,614 | 1,565 | 1,082 | 366 | 676 | 86 | 828 | 604 | 16,407 |
| 2010 | 8,379 | 3,759 | 1,860 | 934 | 809 | 639 | 143 | 227 | 1,150 | 17,900 |
| **2011** | 10,375 | 2,749 | 2,169 | 710 | 829 | 677 | 141 | 170 | 1,464 | **19,284** |
| 2012 | 8,350 | 3,506 | 2,240 | 956 | 848 | 690 | 34 | 409 | 1,821 | 18,854 |
| 2013 | 8,530 | 3,403 | 2,476 | 733 | 861 | 793 | 73 | 1,063 | 1,878 | 19,810 |
| 2014 | 10,922 | 3,462 | 4,946 | 707 | 1,517 | 524 | 129 | 505 | 2,316 | 25,028 |
| 2015 | 7,795 | 2,896 | 2,487 | 818 | 2,815 | 312 | 75 | 1,282 | 2,808 | 21,288 |
| 2016 | 8,429 | 4,111 | 2,784 | 601 | 3,772 | 346 | 375 | 905 | 3,899 | 25,222 |
| 2017 | 9,030 | 3,502 | 2,898 | 484 | 3,267 | 263 | 372 | 976 | 3,442 | 24,234 |
| 2018 | 9,220 | 4,145 | 3,296 | 402 | 3,652 | 225 | 176 | 1,658 | 3,657 | 26,431 |
| 2019 | 8,567 | 3,914 | 5,115 | 476 | 3,029 | 157 | 65 | 2,017 | 5,412 | 28,752 |
| 2020 | 7,295 | 3,779 | 6,685 | 420 | 1,862 | 147 | 51 | 1,430 | 5,168 | 26,837 |
| **2021** | 8,005 | 3,725 | 7,814 | 364 | 1,443 | 176 | 181 | 2,069 | 4,046 | **27,823** |

2021 年马来西亚茶叶进口总量为 27,824 吨。

**茶叶市场份额**

| 企业 | 2019 年份额 |
|---|---|
| 联合利华 | 38% |
| 宝乐茶种植有限公司 | 37% |
| 广汇丰茶行有限公司 | 7% |
| 英国亚曼茶叶公司 | 6% |
| 天仁茗茶 | 3% |
| 其他 | 9% |

上表显示了 2019 年主要茶叶公司的价值份额，我们认为 2020 年和 2021 年没有太大变化。

由于疫情的爆发，许多人在健康，财务安全和失业等多个方面都面临着越来越大的压力。因此，他们会寻找更多方法来缓解焦虑。

这种对减压的需求可以从消费者对茶叶的偏好中看到。茶很好地吸引了这些压力下的消费者，因为许多人已经将这种饮料与放松联系起来。我们认为，由于疫情，2022 年的消费量不会增加。

消费者更注重健康，尤其是年轻一代。电商／在线平台因封锁而增加

为了缓解疫情传播，马来西亚从 2020 年 3 月起

宣布在全国实施“出行限制令”（MCO）。

疫情期间实施的出行限制令（MCO）并未让国内生产停止，但由于在此期间市场需求量将至最低，库存不断增加。由于茶叶来源国的封锁，茶叶进口受到影响。由于缺乏需求，大多数茶商暂停所有进口。

2021 年 6 月 1 日至 9 月 30 日，由于国家再度实施出行限制令，国内经济活动受到严重影响。马来西亚的经济增长在 2021 年第三季度收缩了 4.5%。

在实施 MCO 的各个阶段，民众无法进行区际和州际旅行，刺激了对经济和商业增长放缓以及较低的茶叶消费的预期。

除了对流动性的限制之外，餐饮店没有堂食，也没有公共活动，这不仅影响了整体经济活动，而且自 MCO 实施以来，马来西亚的茶叶消费总量突然减少。

到 2021 年 12 月，疫苗接种率高达 80%，马来西亚正逐渐摆脱疫情爆发最严重的阶段。因此，马来西亚经济预计将在 2022 年走上复苏之路，预计增长 5.8%。

*Mr. Liew Choon Kong (CK Liew) | Chairman of Malaysia Tea Association*

*Born in Kuala Lumpur, Malaysia, CK Liew attained his tertiary education in United Kingdom and graduated with B. Sc. in Civil Engineering in 1981, from University of Dundee, Scotland. He is a Chartered Engineer of UK and a Fellow member of both Institution of Engineers Malaysia and Australia.*

*CK Liew joined the family business KWF Tea Merchants in 1988 as the fourth generation and since master minding the tea business set up by his great grandfather back in 1928. He has since very focus on tea business both locally and internationally, growing the company to trade tea with major tea producing countries around the world including the important tea producing countries like China, Indonesia, Sri Lanka, India, Kenya, Argentina, etc.*

*As an active committee member of Tea Trade Association of Malaysia since 2002, CK Liew has made concerted efforts in generating tea trade between Malaysia and the world, besides promoting tea culture of Malaysia. CK Liew served as the Chairman of Tea Trade Association of Malaysia from 2012 to 2016, and he stepped back as the Deputy Chairman since 2016 due to the constitutional requirement. CK Liew made a great leap forward and effort to organize the "Malaysia International Tea & Coffee Expo" 2014 & 2017. A talk of the town Piala TTAM-Teh Tarik Competition in conjunction with the Expo in 2014 and hit followed suit in 2015 marked another success event under his initiative and hard work . CK Liew also made a great effort in founding the internal bulletin of Tea Trade Association of Malaysia, named TEA TIME. CK Liew has passionately dedicated himself in promoting tea culture and encouraging interaction, co-operation and development of tea trade within Malaysia and abroad.*

***Liew Choon Kong (CK Liew)***





# World Tea Industry Review

Malaysia is more of a tea consuming than a producing country. Domestic production remains constant at 3.3mkg whereas we import about 28mkg from almost 20 tea producing countries. Malaysia has been registering annual growth in consumption but not in the year 2021 due to the Covid-19 pandemic. Per Capital consumption is almost 1kg.

Malaysia consumes all types of Chinese teas. However, almost 80% of the teas consumed is in the form of "Teh Tarik" which is black tea with milk and sugar. The Black, Green and Oolong tea sub-segments split into almost 77:1:12 for the value sales. The size of the Pu'er and White tea segment represents less than RM 10 mil or less than 3% of the total of this market. This is why we consider the value of the segment to be insignificant.

Black, Green and Oolong tea average price in 2021 have increased compared to 2020 due to the increase in freight, depreciation of MYR, etc.

Tea is consumed mostly out of home but the growth of drinking tea at home seems to be accelerating following the outbreak of Covid-19

Tea & Infusions total retail market size is around RM 390 mil in 2021.

Our current estimation shows the split of the total retail vs non-retail sales volume to be around 20:80

Tea segment dominates the whole category as it is the cheaper option compared to Infusion. We believe value and volume sales growth in 2021 would be same as 2020 due to the pandemic.

**TEA IMPORT TO MALAYSIA**

**SHOWING COUNTRY OF ORIGIN**

*Notes: in Tonnes* | *Source: Statistics Department Malaysia*

| | Indonesia | Vietnam | China | Sri Lanka | India | PNG | Australia | Other Asia | Others | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **2001** | 8,083 | 75 | 1,424 | 212 | 244 | 26 | 109 | 714 | 259 | **11,146** |
| 2002 | 7,788 | 42 | 1,426 | 289 | 254 | 38 | 36 | 845 | 102 | 10,820 |
| 2003 | 8,564 | 1,032 | 1,392 | 457 | 213 | 264 | 219 | 344 | 181 | 12,666 |
| 2004 | 10,023 | 1,027 | 976 | 465 | 79 | 15 | 379 | 236 | 454 | 13,654 |
| 2005 | 9,543 | 1,609 | 1,718 | 517 | 159 | 90 | 382 | 405 | 523 | 14,946 |
| 2006 | 8,177 | 2,234 | 1,928 | 597 | 441 | 114 | 240 | 506 | 502 | 14,739 |
| 2007 | 8,542 | 2,274 | 2,430 | 637 | 661 | 210 | 167 | 199 | 534 | 15,654 |
| 2008 | 7,668 | 1,520 | 1,833 | 583 | 122 | 336 | 200 | 662 | 637 | 13,561 |
| 2009 | 7,586 | 3,614 | 1,565 | 1,082 | 366 | 676 | 86 | 828 | 604 | 16,407 |
| 2010 | 8,379 | 3,759 | 1,860 | 934 | 809 | 639 | 143 | 227 | 1,150 | 17,900 |
| **2011** | 10,375 | 2,749 | 2,169 | 710 | 829 | 677 | 141 | 170 | 1,464 | **19,284** |
| 2012 | 8,350 | 3,506 | 2,240 | 956 | 848 | 690 | 34 | 409 | 1,821 | 18,854 |
| 2013 | 8,530 | 3,403 | 2,476 | 733 | 861 | 793 | 73 | 1,063 | 1,878 | 19,810 |
| 2014 | 10,922 | 3,462 | 4,946 | 707 | 1,517 | 524 | 129 | 505 | 2,316 | 25,028 |
| 2015 | 7,795 | 2,896 | 2,487 | 818 | 2,815 | 312 | 75 | 1,282 | 2,808 | 21,288 |
| 2016 | 8,429 | 4,111 | 2,784 | 601 | 3,772 | 346 | 375 | 905 | 3,899 | 25,222 |
| 2017 | 9,030 | 3,502 | 2,898 | 484 | 3,267 | 263 | 372 | 976 | 3,442 | 24,234 |
| 2018 | 9,220 | 4,145 | 3,296 | 402 | 3,652 | 225 | 176 | 1,658 | 3,657 | 26,431 |
| 2019 | 8,567 | 3,914 | 5,115 | 476 | 3,029 | 157 | 65 | 2,017 | 5,412 | 28,752 |
| 2020 | 7,295 | 3,779 | 6,685 | 420 | 1,862 | 147 | 51 | 1,430 | 5,168 | 26,837 |
| **2021** | 8,005 | 3,725 | 7,814 | 364 | 1,443 | 176 | 181 | 2,069 | 4,046 | **27,823** |

**Tea Market Share:**

| VALUE | 2019 |
|---|---|
| Unilever PLC | 38% |
| BOH Plantations Sdn. Bhd. | 37% |
| Kong Wooi Fong Tea Merchants Sdn. Bhd. | 7% |
| Ahmad Tea (Uk) Ltd. | 6% |
| Ten Ren Tea Co Ltd. | 3% |
| Others | 9% |

The table above shows the value shares reported for the key companies in 2019 and we think there is not much changes in 2020 and 2021.

Due to the COVID-19 outbreak, many people are facing increased stresses on a number of fronts, including health, financial security and unemployment. As a result, they are looking for more ways to relieve feelings of anxiety.

This need for stress-relief options can be seen within consumer preferences for tea. Tea is well positioned to appeal to these stressed consumers, as many people already associate the drink with relaxation. We are of the opinion that there will not be an increase in consumption in 2022 due to the pandemic.

Consumers are more health conscious especially the younger generations.

E-commerce/online platform has increase due to the lockdown.

Nationwide "Movement Control Order" (MCO) intended to mitigate the spread of COVID-19 was announced to commence since March 18 2020.

Domestic production was not stopped during the Movement Control Order (MCO) imposed during the pandemic, but stock was building up as there is minimum demand in the market during this period. Tea import was affected due to lock down in source countries. Most merchants hold all imports due to lacking in demand.

Domestic economic activities were severely impacted by the reimposition of Movement Controls from 01st June to 30th September 2021. Malaysia's economic growth contracted by 4.5% in Q3 2021.

The various stages of MCO which bars inter-district and interstate travel, spurs expectation of slower economic and business growth, and lower tea consumption.

The imposition of no dine-in at F&B outlets and no public events on top of the restrictions on mobility, not only weighed on overall economic activity, but has abruptly reduced total tea consumption in Malaysia since MCO was imposed.

With the high rate of vaccination of 80% by December 2021, Malaysia is gradually emerging from the worst wave of the pandemic. As a result, the Malaysian economy is expected to be on a recovery path in 2022 with a projected growth of 5.8%.



王亚雷

王亚雷，毕业于安徽农业大学茶业系机械制茶专业。师从茶叶学术界泰斗、安徽农业大学陈椽教授攻读硕士研究生。留校执教四年后，留学日本国立东京农工大学攻读博士学位。1997 年成立日本中国茶协会，积极从事推广中国茶和中国茶文化活动。担任中国茶叶流通协会常务理事、日本中国茶协会会长、世界茶联合会副会长、上海市茶叶学会常务理事、中国国际茶文化研究会理事、安徽农业大学和湖南农业大学客座教授等社会任职的同时，多次受聘任日本、香港及内地众多国际名茶评比、世界绿茶评比等的评委。

# 2021 年日本茶产业发展现状

## 茶叶产销

据日本农林水产省统计资料，2021 年日本茶园总面积 38,000 公顷，比 2020 年减少 1000 公顷。毛茶产量预计 78,100 吨，比 2020 年增加了 7,600 吨。日本茶园面积逐年缓慢下降，但茶农个体经营的茶园面积却呈现扩大趋势，特别是在九州的鹿儿岛县。茶叶产量自 2004 年达到顶峰逾 10 万吨后逐年减少，近年保持在 7-8 万吨左右。其中作为原叶茶原料的一番春茶的产量减少，作为茶饮料原料的三番茶、四番茶的夏茶以及秋冬茶，却呈增长趋势。另外，市场对碾茶的需求逐渐提升，其产量也随之增加。

近五年日本茶产业的农业产值（毛茶产值）平均每年规模 883 亿日元(折合人民币不足 50 亿元)，主要产地在静冈县、鹿儿岛县、三重县、京都府、福冈县等，其中静冈县、鹿儿岛县、三重县等 3 个县的茶园面积占全国茶园面积 70% 以上。主要茶叶种类有煎茶（占比 54.2%，毛茶平均价 1088 日元（人民币 60 元）/kg）、碾茶（抹茶）（占比 4%，平均价 2168 日元（人民币 119.87 元）/kg）、覆盖茶（占比 3.3%，平均价 1306 日元（人民币 72.2 元）/kg）、玉绿茶（占比 2.4%，平均价 1627 日元（人民币 90 元）/kg、玉露茶（占比 0.7%，平均价 2828 日元（人民币 156.36 元）/kg）和番茶（占比约 35%）等，各品类毛茶价格水平均呈走低趋势。

茶叶（毛茶）价格变化与 PET 瓶装绿茶饮料生产量变化一致，都是在 2004 年达到最高（普通煎茶平均价格约 2000 日元（118.6 人民币元）/kg），随后逐年下降，一直低迷。不同种类、不同生产时期和不同农家生产的茶叶因品质不同，价格有显著差异。

为了提高茶叶品质和产量，日本政府对树龄 30 年以上的老茶园改造、新茶园种植以及新技术新设备的应用（减农药栽培的防除机械、半发酵茶（乌龙茶）和发酵茶（红茶）的加工机械、节能加工机械等）等给予补贴。为了振兴日本茶产业，日本政府于 2012 年 4 月专门出台了振兴日本茶的相关法律《茶的振兴法》，包括基本方针、振兴计划、国家和地方政府的支持政策、国家补助等共 11 条法律条款。

## 茶叶消费趋势

绿茶消费呈现出以茶叶形态的消费不断减少，以 PET 瓶装绿茶饮料形态的消费不断增加的趋势，日本户均绿茶和茶饮料的总消费金额约为 1 万日元（550 人民币元）。另外，碳酸饮料、矿泉水等的消费有扩大趋势。日本茶的消费和流通出现以下新动向：

①积极推进简便快捷的袋泡茶和粉末茶的销售和消费；

②在国内外积极推进不同形式抹茶产品（抹茶、加抹茶的煎茶、加抹茶的袋泡茶、抹茶拿铁、抹茶速溶茶等）的销售，类似胶囊茶的冲泡机也随之受到欢迎；

③抹茶原料“碾茶”的生产量近年呈现增加趋势；

④强调功能性、添加水果香味的茶产品的销售增加；

⑤强调滋味“鲜”、“浓”的商品（冷水泡绿茶、加抹茶的绿茶等）、季节和产地限定的商品（新茶、冬茶、当地绿茶等）、零咖啡因含量的商品（无咖啡因绿茶、低咖啡因绿茶等）、功能性商品（具有抗过敏、抑制脂肪吸收等作用的功能食品）和具有发酵、焙火等特征的商品（日本红茶、焙茶、日本乌龙茶等）的促销和消费。

⑥饮料生产商对茶叶原料 GAP 认证的要求，使得获取 GAP 认证的茶园面积不断扩大，茶园生产性能和茶叶品质也得到了提高。

⑦为了促进茶叶消费，加强对中小学生进行茶文化普及，每年度开展茶叶冲泡方法的指导；由文部省和全国教育委员会编写面向老师的茶叶小册子，发放给学校开展茶叶知识的授课。

## 茶叶进出口贸易

日本茶叶进口量自 2004 年达到最高峰以后，由于绿茶饮料生产对国产原料的要求比例增高，10 年间茶叶进口量减少了一半。2019 年进口红茶 18438 吨（比 2018 年上升 13.4%），绿茶 4390 吨（比 2018 年减少 7.2%）。相较于进口，日本绿茶出口量 10 年间增加了约 3 倍（2020 年茶叶出口达到 5108 吨，与上年度持平）。2018 年日本绿茶出口总额为 146 亿日元，同比下降 5%，出口平均单价 3 美元 / kg。因美国受日本食品流行趋势和茶有利人体健康概念的影响，对美出口量占其出口总量三分之一，近五年对欧盟的茶叶出口量也增加了 2 倍以上。

为了达到茶叶出口额 150 亿日元的既定目标，日本政府开展了一系列促进茶叶出口的活动。在 2016 年 5 月颁布的日本农林水产业出口强化战略中，提出了针对 21 个不同国家（地区）的出口战略和不同类别出口产品的对应方向，例如针对美国市场主要销售具有健康功能的茶叶产品、针对欧盟主要宣传日本茶安全健康的形象、针对亚洲市场重点扩大受欢迎的抹茶产品的销路等。同时，加强对外国人推广日本茶文化的活动，例如在国外，给茶叶进口国提供日本茶的文化、历史和正确的冲泡方法等情报，通过电视等媒体向海外消费者广泛宣传日本茶的魅力等；在国内设立茶的体验农庄，让外国游客体验采茶、参观茶园田间管理、茶叶生产技术等。此外，为了扩大出口，加强了对茶叶进口国的情报收集，建立了应对茶叶进口国农残标准的预防体系，在海外加强日本茶的推广活动，同时开发了新的茶叶生产和加工技术。





***Wang Yalei***

*Wang Yalei, graduated from Tea Machinery, Department of Tea Science, Anhui Agricultural University. And he got his master degree under the mentorship of Professor Chen Chuan, who is the master in tea academic community. Following four-year teaching experience in his alma mater, Mr Wang studied abroad at Tokyo University of Agriculture and Technology for his PhD. He was the founder of Japan China Tea Association, and has been actively involved in promoting Chinese tea and relevant activities. He works as Managing Director of China Tea Marketing Association, Director of NP China Tea Association,*

*Vice Director of World Tea Union, Standing Director of Shanghai Tea Science Society, Director of China International Tea Culture Institute, Guest Professor of Anhui Agricultural University and Hunan Agricultural University. He is often selected to be a judge for international famous tea competitions and world green tea competitions held in Japan, Hong Kong, and Mainland China.*

# The State of Japan's Tea Industry in 2021

## Tea Production and Sales

According to the statistics released by The Ministry of Agriculture, Forestry and Fisheries of Japan, the area of tea plantation in Japan in 2021 totaled 38,000 hectares, down by 1000 hectares compared with 2020. In 2021, the rough tea is expected to reach 78,100 tons, an increase of 7,600 tons compared with 2020. The total area of tea plantation is declining year by year due to many factors while the area of individually operated tea plantation has been on the rise, particularly in Kagoshima prefecture, Kyushu. The tea output peaked at over 100,000 tons in 2004 and then came down to around 70,000 to 80,000 tons in recent years. Specifically speaking, the output of spring tea used to produce whole leaf tea has declined while the tea harvested in summer, fall and winter used as the ingredients for tea beverages has been on the rise. Additionally, the growing demand for Matcha also leads to the rise of its output.

Over the past five years, the value of Japan's tea industry,or rough tea, stood at around 88.3 billion Yen every year on average (or less than 5 billion CNY). The main tea-producing areas are Shizuoka, Kagoshima, Mie, Kyoto, Fukuoka etc., and the tea plantation of the first three prefectures account for over 70% of the total. Japan mainly produces Sencha (accounting for 54.2% of the total and average price of rough Sencha is around CNY 60/ Kg), Matcha( accounting for 4% and the average price is CNY 119.87/Kg), kabusecha (accounting for 3.3% and the average price is CNY 72.2/ Kg), tamaryokucha (accounting for 2.4% of the total and the average price is CNY 90/Kg), Gyokuro (accounting for 0.7% of the total and the average price is CNY 156.36/Kg), bancha (accounting for 35% of the total). The price levels of rough teas produced in Japan are going down.

The changes in the prices of rough tea are in line with the production of bottled green tea beverages. The price peaked in 2004 (average price of ordinary Sencha was 2000 Yen (or CNY 118.6) /Kg) but declined year by year and has been on low levels. The prices of tea of different quality could vary due to different varieties, production periods and producers.

In order to improve tea quality, Japanese government grants subsidies for reconstruction of plantations over 30 years old, cultivation of new plantations as well as application of new skills and equipment (for example, processing machines for semi-fermented oolong tea and fully fermented black tea, energy-saving processing machines, etc.). To revitalize Japanese tea industry, a law referred as "Tea Revitalization Law" was issued in April 2012, which consists of 11 legal provisions including basic policies, recovery plans, supportive policies of central and local governments, state subsidies, etc.

## Consumption Trends

Green tea consumption shows a two-way development trend, with the consumption of green tea leaves continuing to go down while the PET bottled green tea beverages go up. The average household consumption of green tea and tea beverage is around 10,000 Yen (CNY 550). Additionally, the consumption of carbonated drinks and mineral water tends to expand. Below are some new developments regarding tea consumption and circulation in Japan:

1.Japan has been active in promoting the sales and consumption of convenient tea bags and tea powder.

2.Japan has been active in promoting different kinds of Matcha products at home and abroad (such as Matcha, Sencha with Matcha, tea bags with Matcha, Matcha Latte, instant Matcha, etc.), and brewing machines for tea capsule are also gaining popularity.

3 Production of Tencha (raw material of Matcha) has been on the rise in recent years.

4. Sales of functional products such as fruit-flavored tea has been on the rise.

5. Japan has been boosting the promotion and consumption of products with fresh and strong taste (such as cold-brewed green tea, green tea with Matcha), seasonal and single origin products (new tea, winter tea, local green tea, etc.), zero caffeine products (decaffeinated green tea, low-caffeine green tea, etc.), functional products (anti-allergic, blocking absorption of fat, etc.), and products with characteristics such as fermentation and roasting (Japanese black tea, roasted tea, Japanese oolong tea, etc.).

6. Requirements of GAP certification by beverage producers have led to an ever-expanding area of tea plantations with GAP certification, which also helps enhance the productivity of plantation and quality of tea.

7. In order to boost tea consumption, Japan has doubled efforts to educate students in primary and high schools by providing tea brewing instructions every year, offering lectures on tea cultures. And tea textbooks, compiled by Monbusho and National Board of Education for teachers, have been used in classes.

## Tea Trade

Tea imports into Japan have been halved over a 10-year period after its peak in 2004 due to the increasing demand of domestic raw materials used for producing green tea drinks. In 2019, black tea imports reached 18,438 tons (an increase of 13.4% over last year), whereas that of green tea was 4,390 tons (a decrease of 7.2% over last year). The export volume of Japanese green tea increased by three times during the past 10 years (tea export volume reached 5108 tons in 2020, unchanged from last year) The total export value of Japanese green tea in 2018 was 14.6 billion yen, down by 5% year on year, with an average export price of USD 3 /kg. Owing to the trending Japanese food and tea's health benefits, a third of Japan's total tea exports went to America and the exports to the EU have also increased by over two times during the past 5 years.

To achieve the target of 15 billion yen in tea exports, Japanese government has launched a series of activities. The "Reinforcement Strategy of Japanese Agriculture, Forestry and Fishery Export" rolled out in May 2016 include different export strategies towards 21 countries (regions) and products. For instance, tea products with health benefits should be marketed to America, a healthy image of Japanese tea presented towards the EU and the sales of Matcha products should be expanded in Asian markets. Meanwhile, activities to promote Japanese tea culture should be encouraged. For example, to provide information about Japanese tea culture, history, and the right brewing methods to importing countries; to let more overseas consumer to know about the charm of Japanese tea via television or other media platforms; or to build tea gardens at home where foreign tourists could pluck tea in person and experience field management and manufacturing technology of tea, etc. Moreover, in order to boost exports, Japan has reinforced the information collection concerning tea importing countries and established early-warning system to cope with MRL requirements in tea importing countries. In addition, Japan has strengthened the promotion in overseas markets, and developed new tea production and processing technology.

·《茶旅手册》 合著者 （劳特利奇出版社出版）
·粮农组织政府间茶叶工作组有机茶工作小组成员
·粮农组织政府间茶叶工作组茶叶小农工作小组成员
· 2022 年汉东国际茶叶博览会专家委员会成员
·国际茶叶旅游的正式成员
·东盟茶叶组织成员
·2019 年日本埼玉大学科学分析研讨会特邀演讲嘉宾
·2019 年意大利都灵欧洲茶叶展主题演讲嘉宾
·2019 年斯里兰卡第四届管理学跨学科会议主题演讲嘉宾
·2019 年国际茶业精英峰会嘉宾（中国梅州）
·2019 越南茶大师杯 VIP 演讲嘉宾，
·万隆 - 西归浦无酒精鸡尾酒大赛印尼站 - 国际评委
·2019 年泰国国际茶叶咖啡研讨会演讲嘉宾，
·2019 杭州国际茶博会客座学者，
·2019 年第三届国际（宜宾）茶业年会演讲嘉宾，
·国际茶艺学院院长（2017~）
·国际茶科学学会副会长（2005~）
·2008 年韩国茶艺（Teaics）词典作者
· 2008 年《饮料研究》作者
·2003 年茶艺（Teaics）科学结构开发者
·韩国教育部最佳教学教授大奖
·MSC 大学、CWU 大学、KYU 大学茶艺、饮料领域首席教授

**朴炳键教授**

# 韩国茶业概况

## 1、韩国对茶艺（teaics）和世界茶业的贡献

茶叶产区分为两个主要区，这与葡萄酒类似，可分为旧世界茶和新世界茶。韩国已将两个地区概念化为新的茶文化内容。茶叶的生态起源是中国，将茶艺（teaics）系统化的国家是韩国，组织茶道的国家是日本。这三个国家形成特殊的茶文化已有 1000 多年的历史。拥有 1000 多年茶文化的国家也被称为旧世界茶区。

新世界茶叶产区包括印度尼西亚、斯里兰卡、英国、法国和德国。这些国家的茶文化不到 1000 年。特别是，韩国分阶段梳理了茶体验、茶叶识别、茶信息、茶知识、茶理论和茶科学。该过程的系统化衍生出了 224 个与茶相关的学科，并为茶艺（teaics）的研究做出了贡献。

## 2、韩国茶叶消费市场

**2012-2022 韩国茶叶进出口总量**

| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 1-2 月 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 进口量（吨） | 700 | 818 | 891 | 807 | 825 | 1,188 | 1,514 | 1,510 | 1,374 | 1,461 | 278.5 |
| 进口额（千美元） | 7,935 | 9,741 | 11,951 | 9,800 | 10,466 | 16,004 | 20,857 | 20,039 | 21,220 | 24,897 | 4,816 |
| 出口量（吨） | 569 | 558 | 452 | 287 | 375 | 512 | 353 | 363 | 500 | 514 | 76.7 |
| 出口额（千美元） | 5,797 | 7,019 | 4,988 | 4,392 | 5,963 | 6,638 | 5,878 | 4,655 | 6,834 | 16,785 | 2,617 |

## 3、利用茶艺（teaics）的农业治疗认证体系

韩国农林畜产食品部于 2012 年开始进行农业治疗研究，并颁布了《农业治疗研究促进法》，该证书考试在全国范围内进行，大约有 90 名候选人成为农业治疗讲师。到目前为止，农业主要侧重于粮食生产，但《农业康复法》为扩大农业价值提供了机会。

茶叶种植、生产、加工、提取、服务已被纳入茶叶的农业价值链，这些活动成为农业治疗的主要活动。

这种农业治疗活动是监狱和少年监狱有效的矫正教育方案。

初步实验表明，茶疗计划可显著减少囚犯的焦虑，抑郁和攻击性，并使他们在健康精神状态下重返社会。应用茶艺（teaics）进行农业治疗是有效的农业治疗计划之一。

在不久的将来，有必要通过利用与茶叶密切相关的瓷器文化来开发更有效的农业治疗模式。法律层面的关键术语概念如下：

“农业治疗”是指利用各种农业和农村资源，用于恢复，维持和促进人们的健康。它指的是通过相关活动创造社会或经济附加值的行业。

“农业治疗教练”是指执行韩国总统令规定的专业任务的人，例如制定和实施农业治疗计划，并依法获得资格证书的人。

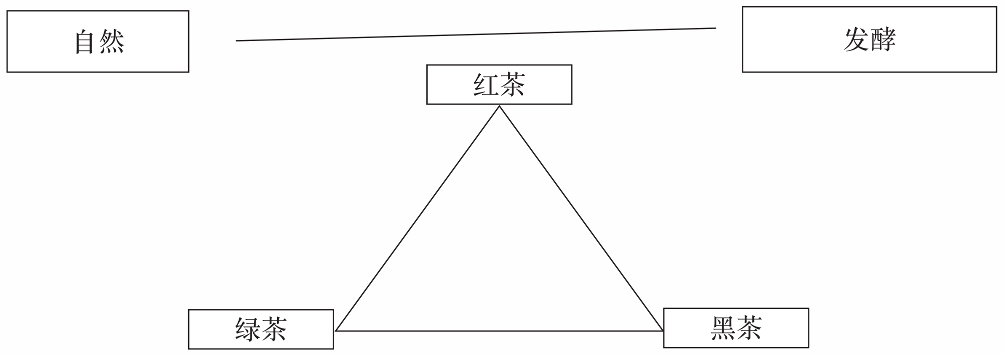
“农业治疗设施”是指根据用户的治疗效果和安全性而适当制造的设施和设备，以便他们能够从事与农业治疗有关的活动。

“农业治疗服务”是指系统地实施使用农业治疗资源和农业治疗设施设计或教育的计划，以恢复和促进心理，社会和身体健康。

## 4、茶三角 - 茶艺中的新理论

中国的 6 种系统化分类已成为世界茶叶行业茶叶产品分类的标准。通过茶三角形概念，我们希望提供绿茶 - 红茶 - 黑茶之间关系的具体概念。

基于克劳德 • 拉维 • 施特劳斯的理论，该概念的结构如下。




该结构所包含的概念是：

绿茶比红茶或黑茶更自然。

红茶氧化程度比绿茶更高。

氧化是茶叶被多酚氧化酶和氧气改变的过程。

黑茶发酵程度比绿茶更高。

发酵改变了微生物对热处理茶的氧化程度。

迄今为止，茶叶发酵和氧化之间一直存在混淆的原因是，汉语中的〞醱酵〞一词包含一些氧化的概念，因此用于表示发酵和氧化。酸化的概念引入红茶后，就没有混淆了。





***Prof. Byung-gun Park***

*· Invited Speaker, Science analysis support seminar in Saitama University Japan 2019*

*· Keynote Speaker, in European Tea Show 2019 in Torino Italy*

*· Keynote Speaker, 4th Interdisciplinary Conference in Management Studies 2019 Sri Lanka*

*· Leaders Group in International tea Elite Summit 2019 (Meizhou, China)*

*· VIP Speaker, Tea master Cup in Vietnam 2019*

*· International Judge Bandung -Seogwipo Tea Mocktail master Competition Indonesia*

*· Non-ASEAN Committee Member, ASEAN Tea Organization*

*· Guest speaker, 2019 Thailand International Tea and Coffee Symposium*

*· Guest scholar, in 2019 Hangzhou International Tea Expo*

*· Keynote speaker, 3rd international tea conference 2019 China in Yibin*

*· Invited speaker, Global Tea Fair 2018 Shenzen China (New industry utilizing Teaics)*

*· Invited speaker, Cocoa Coffee and Tea (CoCoTea) Congress 2018 Herfei China (Structure of Coffealogy)*

*· President Board in International Teaics School (2017~)*

*· Vice president of International Society for tea science (2005~)*

*· Writer of Korea Teaics Dictionary in 2008*

*· Head Writer of General Beverage Studies in 2008*

*· Creator of One-word term Tea studies - Teaics in 2003*

*· Developer of Scientific Structure of Teaics in 2003*

*· Grand prix of Best professor in Teaching by Minister of Korean Ministry Education*

*· Head Professor in Dep. Teaics, Beverage, in MSC Univ., CWU Univ., KYU Univ.*

*· Patent owner on Green tea with Black rice (Korea Patent), Soy bean shoot utilizing Green tea, Soy bean Sauce utilizing Green tea, Alcoholic hangover cures utilizing Oriental medicine, Sprit utilizing onion, Multiple Coffee dripper)*

*· Major in Agronomy, Statistics, Public health, Chemistry, law in Kyunghee, Seoul Nat'l Univ, Korea Open Univ.*

*· B. S. in Statistics, Public health, Agronomy, Chemistry(minor), Law (Course) M.S Medicinal Plant Science, Ph. D Can. Teaics*

# Overview of Korean Tea in 2022

## 1.International contribution of Korea to teaics and world tea industry

The region for tea is divided into two main areas, similar to wine, it can be divided into the Old World Tea and New World Tea. Korea has conceptualized two regions as new tea culture contents. The ecological origin of tea is China, the country that systematized teaics is Korea, and the country that organized the tea ceremony is Japan. It has been over 1,000 years since these three countries formed a special tea culture. Countries with over 1,000 years of tea culture are referred to The Old World Tea Region.

The New World Tea Region is Indonesia, Sri Lanka, the UK, France, and Germany. Those countries have less than 1000 years of tea culture. In particular, Korea has organized tea experience, tea recognition, tea information, tea knowledge, tea theory, and tea science by stage. As a result of systematizing the process, 224 tea related disciplines were developed and contributed to the study of teaics.

## 2. South Korean tea consumption market in 2022

**Total Amount of Import and Export of Tea in 2012-2022**

| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 Jan-Feb |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Import (M/t) | 700 | 818 | 891 | 807 | 825 | 1,188 | 1,514 | 1,510 | 1,374 | 1,461 | 278.5 |
| Import (1000 USD) | 7,935 | 9,741 | 11,951 | 9,800 | 10,466 | 16,004 | 20,857 | 20,039 | 21,220 | 24,897 | 4,816 |
| Export (M/t) | 569 | 558 | 452 | 287 | 375 | 512 | 353 | 363 | 500 | 514 | 76.7 |
| Export (1000 USD) | 5,797 | 7,019 | 4,988 | 4,392 | 5,963 | 6,638 | 5,878 | 4,655 | 6,834 | 16,785 | 2,617 |

## 3.Agro-healing certification system utilizing teaics

Korea's Ministry of Agriculture, Food and Rural Affair started Agro-Healing research in 2012 and enacted the Agro-Healing Research Promotion Act. Exams for certificate were conducted on a national scale. As a result, about 90 candidates became Agro-Healing Instructors. Until now, agriculture had mainly focused on food production, but the Agro-healing Act provided an opportunity to expand the value of agriculture.

Tea cultivation activities, tea production activities, tea processing activities, tea extraction activities, and tea hospitality activities were included in the agricultural value of tea, and those activities became the main activities of Agro-Healing.

Such Agro-Healing activities were developed as effective correctional education programs in prisons and juvenile prisons. It is a healing-teaics program.

Preliminary experiments showed that the inmates who performed the healing-teaics program significantly reduced anxiety, depression, and aggression, and had the effect of returning to society in a mentally sound state. Agro-Healing by applying teaics was recognized as one of the effective Agro-Healing programs.

In the near future, it is necessary to develop a more effective model of Agro-healing by utilizing the porcelain culture closely related to tea. This is defined as the Teaics-Porcelain cultural fusion program.

Here, the concepts of key terms at the legal level are as follows.

"Agro-Healing" refers to the utilization of various agricultural and rural resources used to recover, maintain, and promote people's health. And it refers to an industry that creates social or economic added value through related activities.

"Agro-Healing Instructor" means a person who performs professional tasks prescribed by the Korean Presidential Order, such as development and implementation of the Agro-Healing program, and who has obtained qualifications according to the law.

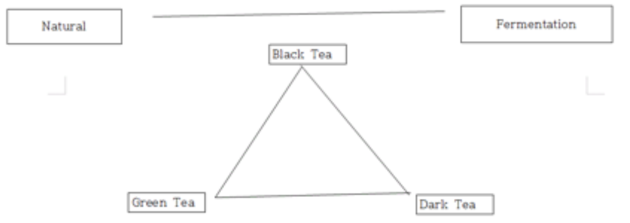
Here, "Agro-healing facility" refers to facilities and equipment that are appropriately created in consideration of the user's healing effect and safety so that they can engage in agro-healing-related activities.

Here, "Agro-Healing Service" refers to the systematic implementation of programs designed or educated using Agro-Healing Resources and Agro-Healing facilities to restore and promote psychological, social, and physical health.

## 4, Triangle of Tea as a new theory from teaics

The 6 kinds of classification systemized in China has been the standard for classifying tea products in the world tea industry. By using the Triangle of tea concept, we want to provide a concrete concept of the relationship between green tea - black tea - dark tea.

Based on the theory of Claude Lavi Strauss, it can be structured as follows.




The concepts contained in this structure are as follows.

Green tea is more natural than black tea or dark tea.

Black tea has a higher degree of oxidation than green tea.

Oxidation is the change of tea leaves by polyphenol oxidase and oxygen.

Dark tea has a higher degree of fermentation than green tea.

Fermentation changed the heat-treated tea by microorganisms.

The reason there has been confusion between fermentation and oxidation in tea until now is that the Chinese word 醱酵 contains some of the concept of oxidation and is therefore used for both fermentation and oxidation. Currently, there is no confusion because the concept of 酸化 has been introduced to black tea.

职位：尼泊尔茶协会副会长，TTS 茶农合作社主席，尼泊尔茶叶与花草茶科学协会（HATSSON）主席，尼泊尔世界事务理事会终身成员。

从业经历：加德满都市政厅前首席执行官 / 市长，教育部主任，尼泊尔政府民政事务部首席移民官 / 联合秘书，为民服务 30 年。

出访 / 旅行：作为尼泊尔政府官方代表到访过亚洲、欧洲、北美和南美等 25 个国家。

培训经历：人权（瑞典），灾难管理（泰国）

**加奈什·莱**

# 尼泊尔茶叶市场

## 背景

茶叶是尼泊尔主要的经济作物，本国的茶叶行业目前仍处于发展阶段中。得益于良好的农业气候条件，尼泊尔东部山区成为茶叶主产区，主要生产传统红茶和 CTC 茶。喜马拉雅地区：伊拉姆 (Ilam) 和雅帕 (Jhapa) 县、潘奇塔尔 (Panchthar)、博杰普尔 (Bhojpur)、科塘（Khotang）、德哈土姆 (Terhathum) 也正被开发成为茶叶产区。近年来，茶叶种植在逐渐向西部地区扩展，例如桑库瓦沙巴 (Sankhuwasabha)、索卢昆布（Solukhumbu）、拉梅查普 (Ramechhap)、拉特利普尔 (Lalitpur)、拉姆琼 (Lamjung) 等地。

根据国家茶叶和咖啡发展局（NTCDB）今年的数据，2020-2021 年尼泊尔生产了 25,000（MT）茶叶，茶园面积 30,000 公顷。虽然尼泊尔向国际市场出口大量茶叶产品，但仍无法满足国外对茶叶的大量需求。尼泊尔有 120 家茶厂，总产能为 52,100 吨，目前产能仅占到 30%。

该行业价值链中最重要的参与者是茶叶种植者、合作社、当地贸易商、茶园和工厂、加工业、出口商和零售商。茶叶种植者和生产者合作社负责种植和采收，加工厂将茶叶加工成包装茶，加工厂负责加工茶叶，本地茶商、合作社和零售商负责将产品卖给消费者。出口代理商和相关生产商开拓国际市场，尤其是传统红茶和特种茶市场。

尼泊尔茶叶种植者可以直接与茶商和中间商对接，后两者会将他们的产品销往国内外市场，但是个体种植者通常没有议价权，而且也没有获得合理的待遇。相比个体种植者，茶叶生产合作社能以更高的价格卖出茶叶，这样给类似 TTS 这类的茶叶合作社提供了成长空间。

由于印度与尼泊尔接壤，印度茶商距离港口 - 加尔各答很方便，所以他们控制着尼泊尔大部分茶叶市场。尼泊尔茶叶价格低，印度茶商收过去进行再次包装定价后再卖给其他地方的客户。

## 茶叶贸易（2020/2021）

国际市场出口总额：11,921 公吨

国内消费总量：13,000 公吨

## 尼泊尔茶叶进口商

印度，欧盟，日本，中国，美国，俄罗斯，新加坡，捷克，加拿大，马来西亚，斯里兰卡，澳大利亚，智利，中国香港，韩国，立陶宛，新西兰，挪威，瑞士，英国，乌克兰，海湾国家，越南。

| S.N | 项目 | 数量（吨） | 金额（百万卢比） |
|---|---|---|---|
| 1 | 红茶 ( 发酵 ) | 11,762 | 3,554 |
| 2 | 红茶 ( 未发酵、轻微发酵 ) | 55 | 22 |
| 3 | 绿茶 ( 未发酵 ) | 104 | 221 |
| | 总计 | 11,921 | 3,797 |

## 尼泊尔茶叶：喜马拉雅赐予的品质

尼泊尔政府和国家茶叶咖啡发展局设计了标志尼泊尔茶叶品质和市场的 logo，这对尼泊尔茶业在全球市场中竞争就有里程碑式的意义。它代表的是来自尼泊尔喜马拉雅原始地区高海拔茶园所生产的有机传统红茶。

农业生态上以及地理气候上来看，尼泊尔拥有得天独厚的环境，也赋予尼泊尔茶叶更高的品质和产量，满足更多来自世界各地的市场需求。

NEPAL TEA
QUALITY FROM THE HIMALAYAS

*Public Positions: Vice President - Nepal Tea Association, Chairman- TTS Tea Agro-cooperative, Chairman - Herbal And Tea Science Society Of Nepal (HATSSON), Life Member - Nepal Council of World Affairs.*

*Experiences : former CEO/Mayor of Kathmandu City Office, Director General/ Ministry of Education, Chief Immigration Officer/Joint Secretary/Ministry of Home Affairs/Nepal Govt. - 30 yrs of civil service.*

*Visits/Travels : 25 countries of Asia, Europe, North & South America as capacities of official delegate or govt. representatives of Nepal*

*Trainings : Human Rights (Sweden), Disaster Management (Thailand)*

***Ganesh Rai***

# Nepal Tea Market

## Background

Tea industry in Nepal is still in its developmental stage. Tea farming and industry is one of the major cash crops of Nepal. Nepal produces both CTC and orthodox tea in the eastern region. The favorable agro-climatic & ecological conditions existing in the eastern Mountain & hill districts have made the region the main hub for tea production in Nepal. The Himalayan districts: Jhapa, Ilam, Panchthar, Dhankuta, Bhojpur, Tehrathum, Khotang have been developing as Tea zones in Nepal. Recently, the tea cultivation has been expanded westwards, through Sankhuwasabha, Solukhumbu, Ramechhap, Lalitpur, Nuwakot, Lamjung, Kaski so on.

Acording to this years data from National Tea and Coffee Development Board (NTCDB), 25,000 (MT) of tea was produced in Nepal 2020-2021 with tea plantation being done in 30,000 hectares of land. While Nepal exports a large volume of its tea products to international markets, it has still not been able to meet high demands of tea abroad. There are 120 tea factories in Nepal, which have a total capacity of producing 52,100 MT of tea, bur currently has been producing only 30% of the total capacity.

The most important actors in the value chain of this industry are tea growers, cooperatives, local traders, tea state and factories, processing industries, exporters and retailers. Tea growers and producer cooperatives are responsible for growing and producing tealeaves, factories process the tea leaves for tea packages, and local traders, cooperatives and retailers take it to the consumers. Export agencies & concerned producers themselves find the international market of Tea especially Orthodox & Specialty Tea.

Tea growers in Nepal have access to traders and intermediaries who take their products to national as well international markets, but individual growers usually have little bargaining abilities, and aren't always compensated fairly. However, tea production cooperatives can gain higher prices as compared to individual tea farmers, giving rooms for tea cooperatives like TTS Agrocooperative in Nepal.

Major chunk of Tea market of Nepal is being handled by Indian merchants due to easy geographical and comfortable access to sea ports, Calcutta. But Nepalese Tea has been getting lower price and valuation, while Indian traders use to repackage and revalue the Nepalese products and sent to their destinations.

## Tea Importers From Nepal

1.India
2.European Union
3.Japan
4.China
5.USA
6.Russia
7.Singapore
8.Czech
9.Canada
10.Malaysia
11.Sri Lanka
12.Australia
13.Chile
14.Hongkong
15.South Korea
16.Lithuania
17.New Zeaand
18.Norway
19.Switzerland
20.U.K
21.Ukraine
22.Gulf Countries
23.Vietnam

**Made Tea Exports (2020/2021)**

| S.N | Particulars | Amount in Metric Tones | Price in Millions NCRs |
|---|---|---|---|
| 1 | Black Tea (Fermented) | 11,762 | 3,554 |
| 2 | Black Tea (Not Fermented partially fermented) | 55 | 22 |
| 3 | Green Tea (Not Fermented) | 104 | 221 |
| | Total Value | 11,921 | 3,797 |

## Nepal Tea : Quality from the Himalayas

Government of Nepal, National Tea & Coffee Development Board has developed Nepalese Tea quality and market logo. This is foremost milestone for Nepalese Tea Trade in the global market. It signifies and glorifies Nepalese Organic, Orthodox Tea produced in high altitude serene Tea gardens of Himalayan virgin soil of Nepal.
Agroecologically & geoclimatically Nepal deserves fine environment for higher quality & specialty tea Nepalese tea in quality as well as quantity will fulfill more market demands from around the world in days coming ahead.

EUROPE

欧洲


莎伦 . 霍尔博士

莎伦 . 霍尔博士是英国茶叶委员会（UKTIA）的执行主席，她在 2018 年接任该职位之前曾就职于马铃薯加工协会（PPA）和零食、坚果和薯片制造商协会（SNACMA），并任主席。她在董事会管理、战略领导、沟通和危机管理方面拥有丰富经验，这令她在行业内颇负盛名。

霍尔博士拥有应用生物学荣誉学位、科学传播硕士学位和分子生物学与生物化学（植物科学）博士学位。在她作为博士后研究员的职业生涯中，她研究了一系列关于作物和疾病间相互作用的问题。

攻读硕士学位过程让她产生了从实验室转移到沟通角色的想法，她先后做了华威大学的科学传播官和洛桑试验站的对外关系负责人。洛桑实验站是英国最古老的农业研究机构，在那里，霍尔将活动的内容和公众交流，并与农业和园艺科学的利益相关者和政策制定者沟通。

在加入行业协会之前，霍尔博士是英国农业征税委员会（AHDB）的知识转移和沟通主管，她直接与农民合作，亲身体验供应链中的挑战。霍尔博士坚信，一个部门内的协同工作可以创造机会，提高可持续性和生产力。

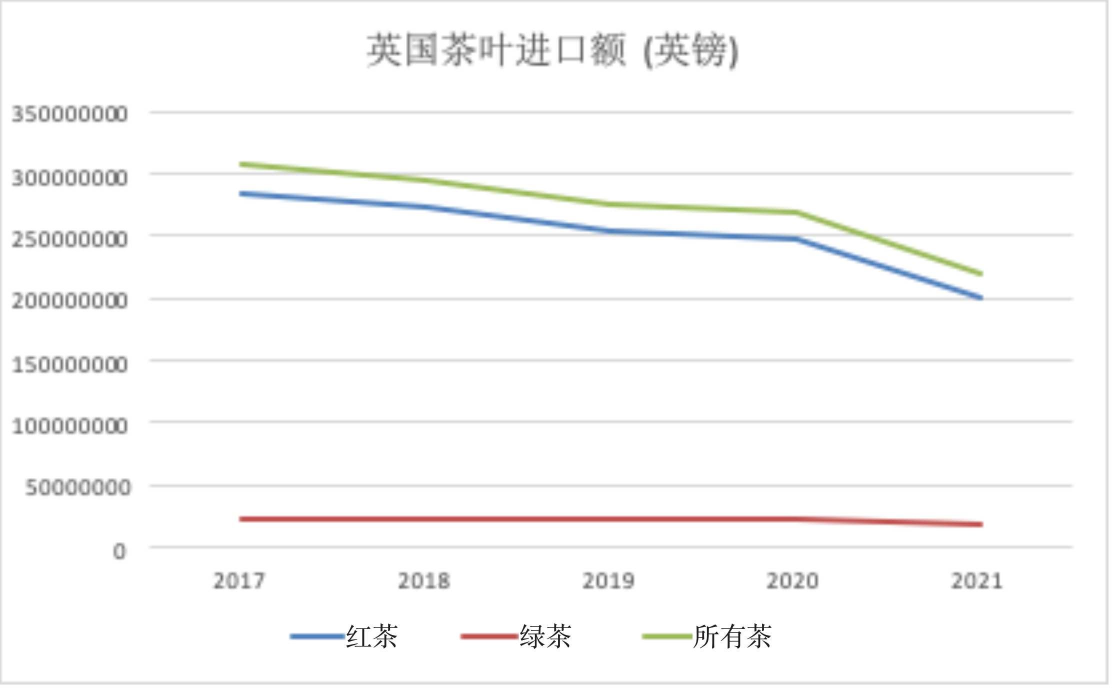
# 2021 年英国茶叶市场及未来展望

## 2021 年市场回顾

2021 年 2 月，英国政府发布了解除疫情封锁限制计划。到 3 月，学校已经重新开放，3 月底，允许户外聚会。与此同时，英国加快了疫苗接种计划的步伐，虽然苏格兰、威尔士和北爱尔兰仍然存在一些限制，但英格兰的餐馆在五月份已经重新开放堂食。到 7 月，大多数对社交接触的法律限制被取消，英格兰最终关闭的经营部门（如夜店）也重新开放。

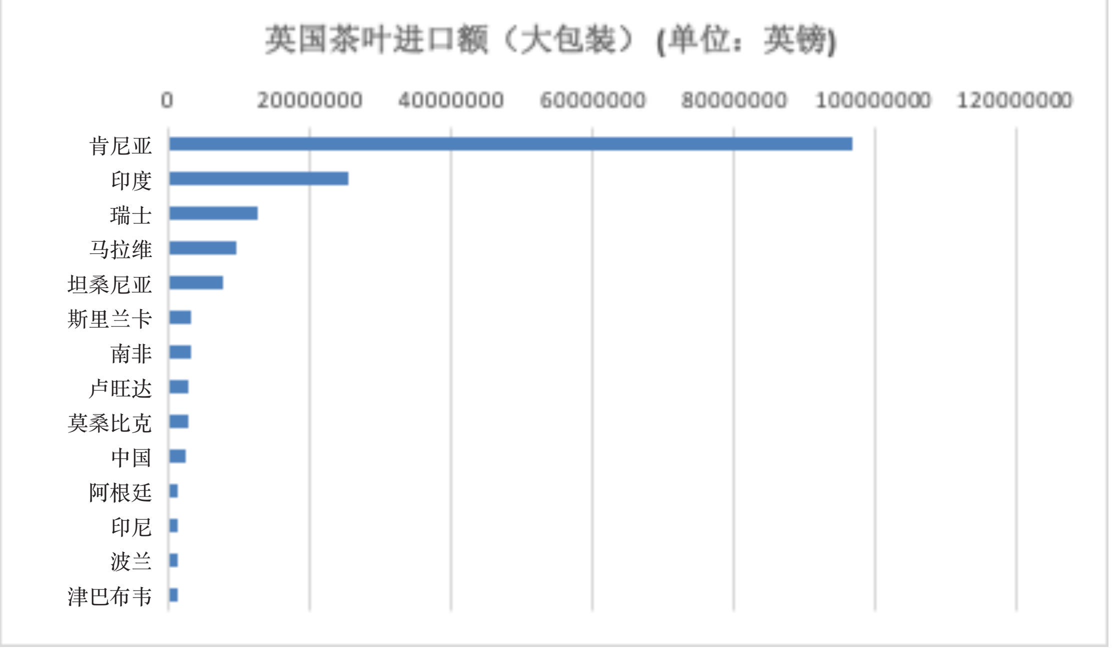
随着限制的解除，人们回到工作和社交场所，居家时间越来越少，快餐店的食品服务支出份额也从 24% 上涨到 45%，而超市支出份额从 23% 下降到了 8%（凯度咨询）。家庭茶叶消费量也受到影响，在 2020 年封锁期间，家庭茶叶消费量显著增加，2021 年茶叶零售总额（包括花草茶和水果茶（HFI））略低于 6.96 亿英镑，同比下降 4.4%。原茶销售额 5.78 亿英镑，同比下降 6% 以上。然而，脱咖啡因茶的销售额确实在继续增长（同比增长 1.3%），达到近 6850 万英镑，包括路易波士茶在内的 HFI 类别在同期销售额达到近 1.18 亿英镑，同比增长 4.5%（凯度咨询）。

**英国茶叶市场仍以红茶为主**




·不包括花草茶和水果茶（HFI）

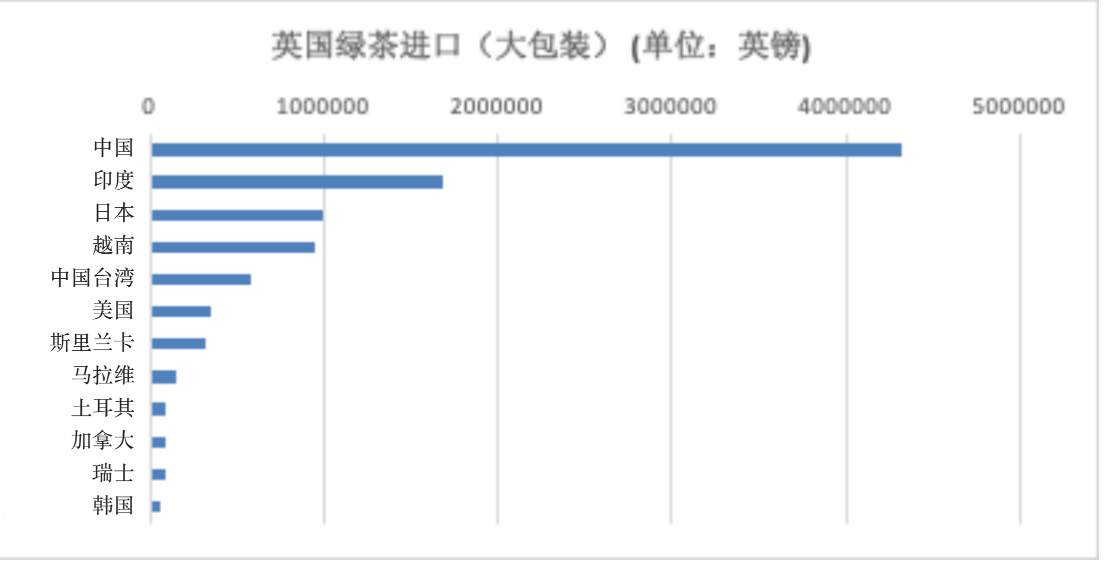
尽管销量在持续下降，但红茶（以茶包形式出售）仍是英国主要消费类别，而绿茶销售保持相当稳定。英国的大部分红茶来自肯尼亚，它们通常被用来与来自印度、斯里兰卡或非洲其他地区的茶进行拼配。



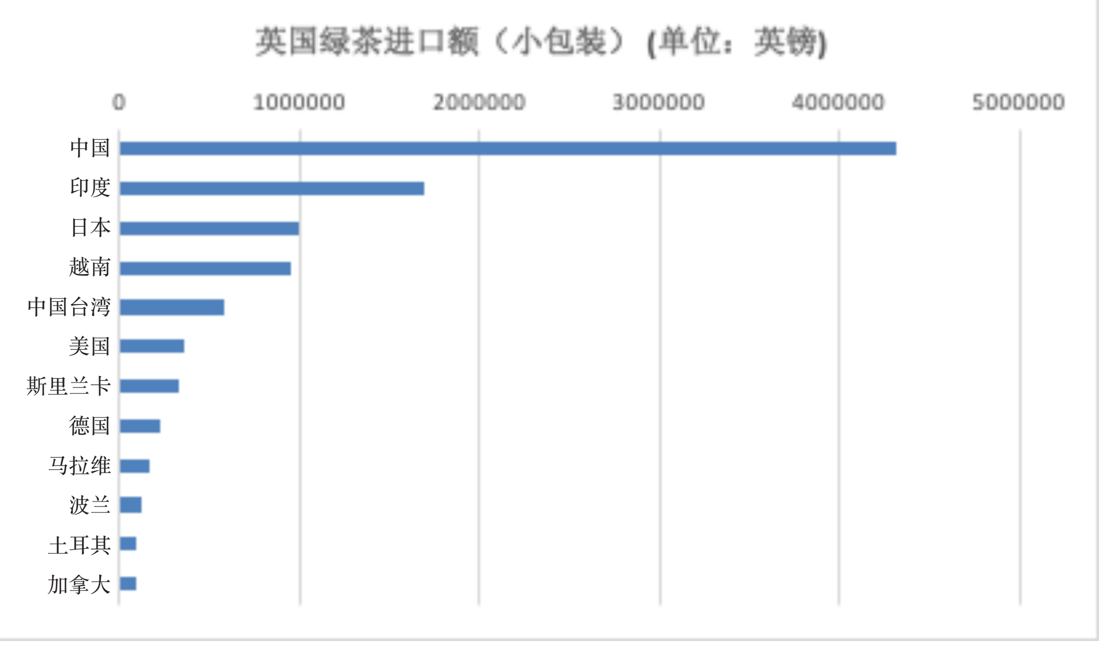





**绿茶进口**




2021 年，英国从 27 个国家 / 地区批量进口散装绿茶，总额为 990 万英镑（上表显示的是前 12 个国家 / 地区）。




2021 年，英国从 43 个国家 / 地区进口包装绿茶，进口总额超过 1000 万英镑（上表显示了前 12 个国家 / 地区）。绿茶进口总额为 1990 万英镑，比 2018 年增长了近 27%（2018 年绿茶进口额为 1570 万英镑）。中国是英国绿茶（包括包装和散装茶）的主要来源国。

## 展望未来

随着自我护理运动的兴起，以及人们对植物性饮食的兴趣日益浓厚（见下文），我们通过宣传茶产品健康属性，让消费者了解更多茶叶类型、口味和原产地，促进茶叶消费。为此，我们在2021年的“国际茶日”制作了“世界各地的80种茶”系列视频，我们将继续发布视频（见YouTube.com/UKTalkingTea）。

随着英国消费者开始减少居家时间，茶叶行业必须确保在家庭以外的场所喝到的茶符合消费者的期望，但复制消费者在封锁期间在家中为自己创造的优质泡茶体验会成为一大挑战。为此，我们需要创新，并向咖啡行业取经。在咖啡行业中，在家庭以外养成的习惯也推动了供家庭消费的咖啡师式产品的发展。尽管来自咖啡的竞争非常激烈，但冷饮是茶的主要竞争对手，因此茶叶公司可以借助冷萃茶饮的市场欢迎度，关注随身茶产品消费。

可追溯性和可持续性对消费者选择的影响越来越大，尤其是年轻消费者，近80%的受访者表示，他们正在基于社会责任改变购买方式，以减少对环境的影响。超过四分之一的消费者表示，碳足迹信息是驱动他们购买的关键因素，欧洲零售商们正在采用大量提供碳足迹和环境影响信息的新标签方案，并且将来可能会在整个欧洲强制使用。这意味着茶叶行业需要更深入地了解“从茶树到茶杯”全产业链所产生的影响。这是一个可以让我们去主动决定如何向前迈进的机遇，并以此为平台来促进行业的可持续性和未来发展。

我们知道，茶叶供应链中产生影响最大的部分是消费者在家泡茶的过程。大多数消费者在泡茶时会至少煮沸两倍于他们所需要的水，浪费了时间、金钱和精力。新兴的Smart Boil活动充分体现了业界的想象力，各大茶叶品牌也支持我们鼓励消费者只煮沸他们泡茶所需的水。这项节能运动不仅对地球有益，还帮助我们将茶叶纳入国家对话中，特别是在2021年联合国气候变化大会（COP26）期间，我们便发起了Smart Boil运动。

由于消费者在努力减少对环境的影响，他们的肉食摄入量也在减少，植物性饮食逐渐流行起来，即使对于非素食主义者和非素食者也是如此。电视中充满着无肉替代品的广告，而茶是植物性饮食运动的一部分，以及无肉/纯素食的绝佳佐餐饮料，因此我们要借此机会来推广茶。

## UKTIA继续委托茶叶健康属性研究

英国市场报告表明，消费者愈发重视自己的幸福感，食品和饮料行业有机会围绕通过自我护理实现幸福感创造新的沟通环境。对于茶叶行业来说，这已经转化为HFI和脱咖啡因茶消费的增长，我们需要加倍努力提高人们对红茶和绿茶健康属性的认识。报告显示，消费者对茶中某些特定成分（如L-茶氨酸和儿茶素）的理解在不断增长。在此基础上，我们还要意识到授权的包装声明可以提升消费者的信任和信心，但这需要强大的数据基础，还要用消费者理解的语言去进行沟通。

在由中国主办的”全球茶人新年见面会”中，主办方宣布了一个项目，即整理来自世界各地的茶叶健康研究成果，并提供信息共享平台。这是一项值得欢迎的举措，UKTIA也表示支持。我们会继续致力于促进茶叶与HFI的健康属性，也将分享UKTIA资助的茶叶咨询小组（TAP）研究成果的所有链接。

就UKTIA赞助的TAP研究的媒体覆盖率而言，2021年是我们有史以来最成功的一年。基于研究论文“茶与健康贯穿一生”，TAP发布了“茶与岁月”，当时英国政府正好发布了关于减少儿童糖摄入量的目标。我们传递的信息很简单，那就是喝茶有益于所有年龄段的人，人们对该信息的接受度也不错。媒体重点报道了关于茶是含糖饮料的绝佳替代品（特别是对于儿童来说），还以一张一个年轻女孩喝着一杯茶的标志性图片登上了头版报道，茶也成为全国乃至世界性的核心讨论话题。这份TAP报告仍在体现其价值，我们计划发布更多的新闻稿件和开展社交媒体宣传，重点关注茶对其他年龄段人群的益处。

TAP在2021年还发表了关于“茶与运动和健身”的论文，该论文评估了茶在运动和健身表现方面的作用。仅在英国，健身行业以及健康食品和饮料市场规模就有数十亿英镑，推广茶对锻炼前后的补水作用拥有许多大好机会。运动能量饮料市场的规模也有数百万英镑，而且人们对于摄入过多糖分和咖啡因的担忧也使茶成为一种含有适度咖啡因的首要无糖饮品替代品。

TAP已经在2022年发表了一篇关于茶在心理健康和心血管健康中的作用的新研究论文。有证据表明，喝红茶可能有益于心脏健康，红茶和绿茶都有助于放松、缓解压力、降低痴呆和认知能力下降风险，并可能改善高龄人群的注意力和精神力。预计会有大量媒体发布相关报道，在现有取得的成果中，我们今年也会再接再厉。

TAP论文发表在公开期刊上，因此全球业界同仁都可以与我们一起宣传喝茶带来的相关健康益处。

## 结语

茶集美味、提神、补水、健康和可持续性于一体。在“茶”这个词最广泛的定义中，我们期待与全球业界同行加强合作，积极分享关于茶的益处的信息。让我们共同努力吧！

*Dr Sharon Hall is the Chief Executive of the United Kingdom Tea and Infusions Association (UKTIA), a role she took on in 2018. Her previous roles include Director General of both the Potato Processors' Association (PPA) and the Snack, Nut & Crisp Manufacturers' Association (SNACMA). She has extensive experience of high level stakeholder engagement, strategic leadership, communications and issues management, utilised to both protect and enhance the reputation of the sector she is representing.*

*Dr Hall has an honours degree in Applied Biology, a Masters in Science Communication and a PhD in Molecular Biology and Biochemistry (Plant Science) and during her career as a postdoctoral researcher she investigated a range of crop and disease interactions.*

*Undertaking the Masters degree triggered a move from the lab into communications roles including Science Communications Officer at the University of Warwick and then Head of External Relations for Rothamsted Research, the UK's oldest agricultural Research Institute, where she delivered communications and events to engage the public, stakeholders and policymakers in agricultural and horticultural science.*

*Prior to leading Trade Associations, Dr Hall was Head of Knowledge Transfer and Communications at the UK's Agricultural Levy Board (AHDB), where she worked directly with farmers and experienced first-hand challenges within the supply chain. Dr Hall firmly believes that collaborative working within a sector can create opportunities to enhance sustainability and productivity.*

***Dr Sharon Hall***

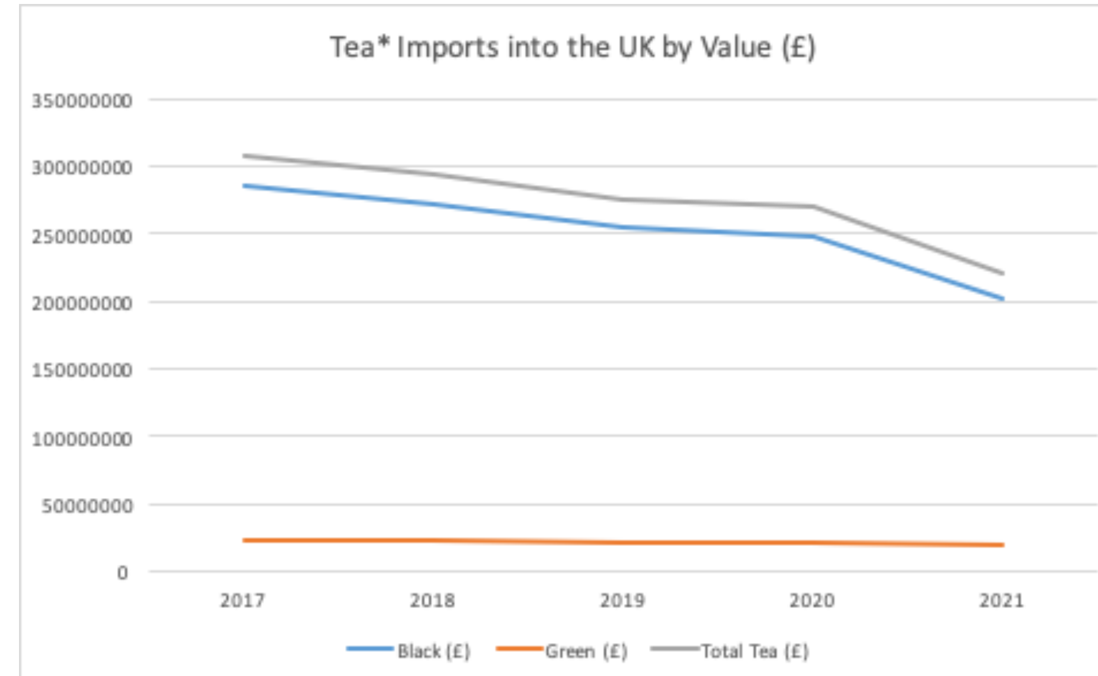
# The UK Tea Market in 2021 and A Forward View

## 2021 Market Review

In February 2021 the UK Government published a roadmap for lifting the COVID-19 lockdown restrictions. By March schools had reopened and by the end of that month outdoor gatherings were allowed. Meanwhile, the pace of the UK's vaccination programme ramped up and whilst some restrictions remained in place in Scotland, Wales and Northern Ireland, restaurants in England reopened for indoor dining in May. By July, most legal limits on social contact were removed, with the final closed sectors of the economy (e.g., nightclubs) reopening in England.

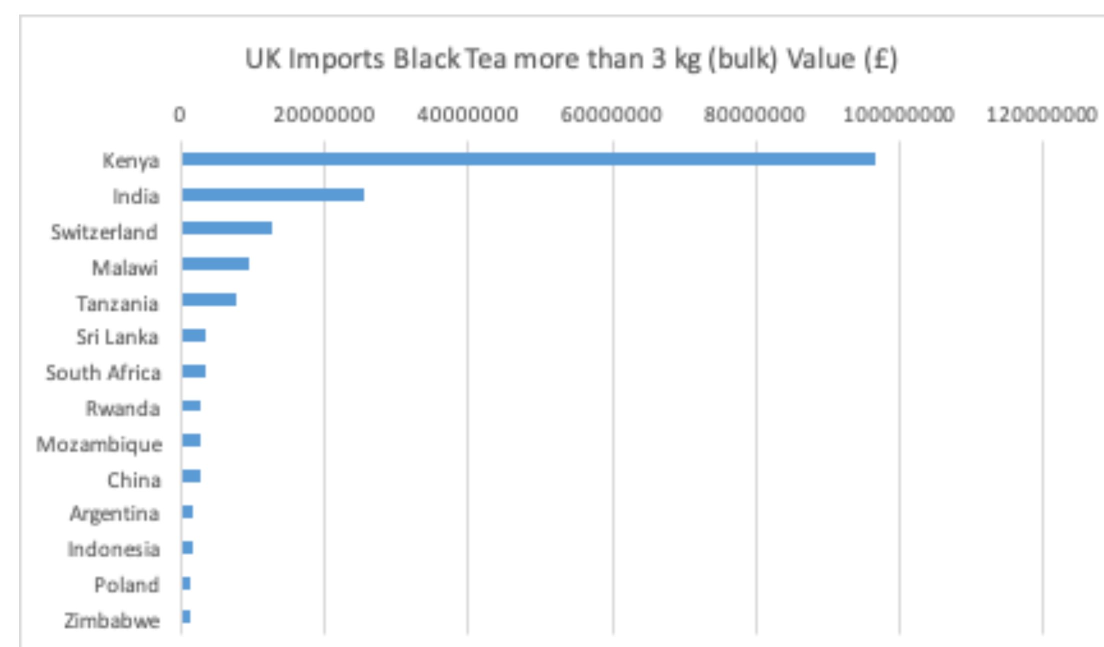
As restrictions lifted, people spent less time at home. They returned to workplaces and social venues and consequently the share of food service spend at quick-service restaurants increased from 24% to 45%, whilst the supermarket share of spend decreased from 23% to only 8% (Kantar 52 weeks to September 2021). This also impacted in-home tea consumption, which had increased significantly during the 2020 lockdown, and the value of the total tea purchased at retail (including Herbal and Fruit Infusions (HFI)) decreased by 4.4% (2021v 2020) to just under £696M. True tea sales value fell by over 6.0% to £578M. However, decaffeinated tea did continue to grow in value (1.3%) to almost £68.5M and the HFI category, including Rooibos, also grew by 4.5% during the same period, to almost £118M (Kantar, 52 weeks to January 2022).

**The UK tea market continues to be dominated by black tea**

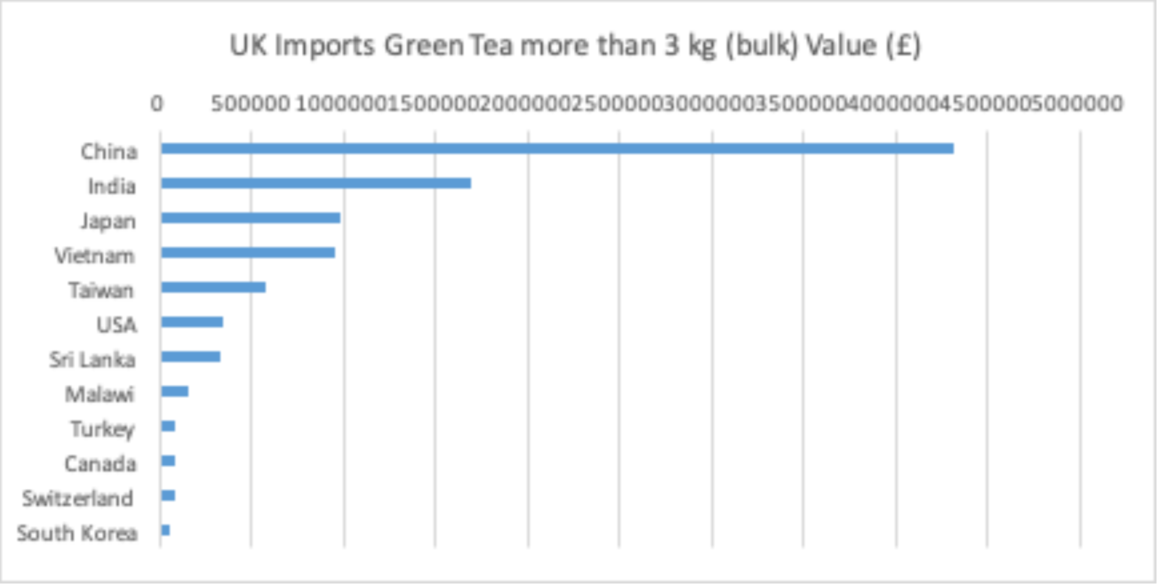



**Not including HFI*

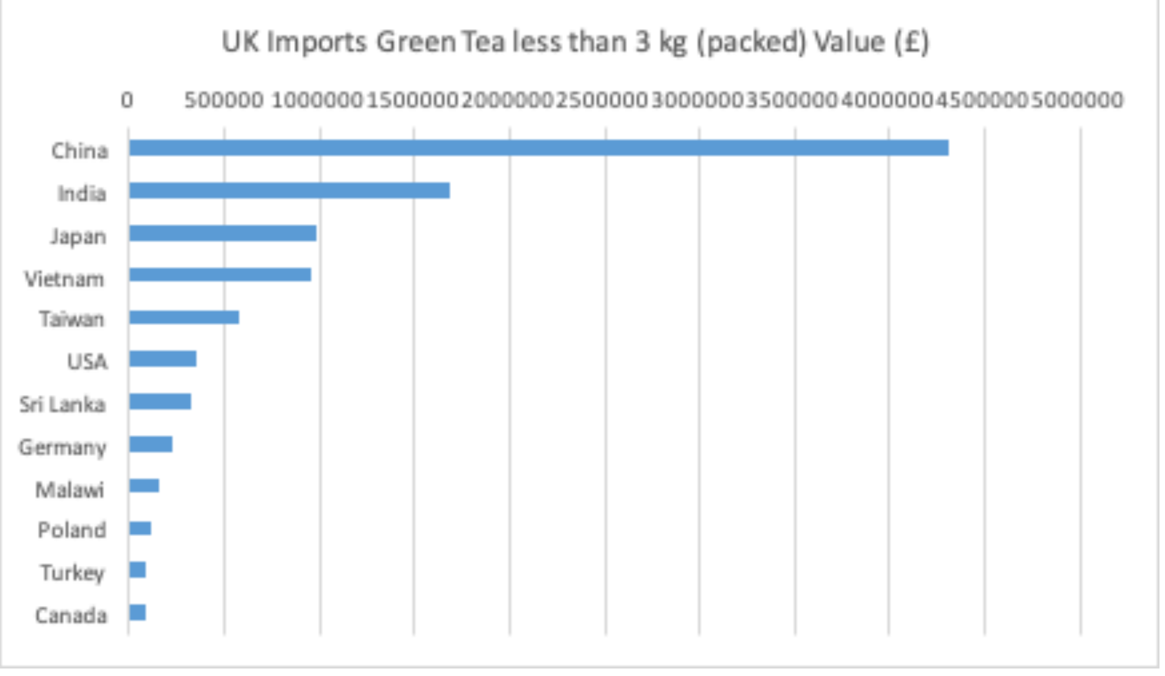
Despite ongoing volume decline, black tea (sold in tea bags) remains the dominant category in the UK, while green tea sales have remained fairly constant. Most of the black tea imported into the UK comes from Kenya which usually consumed as a blend with tea from India, Sri Lanka or other parts of Africa.



### A Focus on Green Tea




The UK imported green tea in bulk from 27 countries in 2021, with a total value of a £9.9M (top 12 countries shown).




Packed green tea was imported from 43 different countries in 2021, with a total value of over £10M (top 12 countries shown). The combined value of green tea imports at £19.9M is up almost 27% from 2018, when the value of green tea imports stood at £15.7M. China retains the top spot as the leading exporter of green tea (both packed and bulk) to the UK.

### Looking forward

With the rise of the self-care movement and growing interest in plant-based diets (see below), there are huge opportunities to boost both black and green tea sales by raising the profile of the health credentials of Camellia sinensis products and educating on the wider range of tea types, tastes and origins available. With this in mind, we created 'Around the World in 80 Teas' for International Tea Day in 2021 and we are continuing to publish new episodes (See YouTube.com/UKTalkingTea).

As UK consumers start spending less time at home it is critical for the industry to ensure that tea drunk out of home meets consumer expectations. The challenge will be to replicate the quality brew experience that consumers created for themselves at home during lockdown. Innovation is needed to achieve this goal and we can learn from the coffee sector, where habits developed out of home are also driving the development of barista-style products for in-home consumption. Competition from coffee sold out of home continues to be fierce, but cold drinks are the main competitor for share of throat, so tea companies could look to build on the popularity of cold brew tea drinks for on-the-go consumption.

Traceability and sustainability are increasingly influencing consumer choices, especially younger consumers, with almost 80% saying they are changing their purchasing based on social responsibility and to reduce environmental impact. Over a quarter of consumers say carbon footprint information is a key purchase driver and in Europe a plethora of new labelling schemes, which provide carbon footprint and environmental impact information, are being adopted by retailers and will likely become mandatory across Europe in the future. This means the industry will need to have a deeper understanding of the impacts of the supply chain from bush to cup. We see this as an opportunity to proactively decide how we can move forward and use this as a platform to promote the sustainability credentials of the industry and our pathway to further development.

We know the largest proportion of impact in the tea supply chain is the preparation of the beverage by consumers in their own homes, when they boil the kettle. Most consumers boil at least double the water they need when they make their tea and this wastes time, money and energy. Our new Smart Boil campaign captured the industry's imagination with major brands supporting our efforts to encourage consumers to boil only what they need to prepare their tea. This energy saving campaign is not only good for the planet, but it also helped us get tea into the national conversation, particularly around the 2021 United Nations Climate Change Conference, COP26, when we launched the Smart Boil campaign.

As consumers strive to reduce their environmental impact they are eating less meat and there is a growing trend towards plant-based diets, even for non-vegans and non-vegetarians. Our TV screens are flooded with adverts for meat-free alternatives and the tea industry needs to take this opportunity to promote teas as part of this plant-based movement and as a great beverage accompaniment for meat-free/ vegan meals.

### UKTIA continues to commission tea health research

UK Market reports suggest that consumers have a greater sense of wellbeing at the forefront of their minds and the food and drink industry have an opportunity to create a new communications landscape around the aspiration to achieve wellbeing through selfcare. For our industry, this has translated into the growth in consumption of HFIs and decaffeinated tea, and we need to do more to raise awareness of the health credentials of both black and green tea. Reports suggest that going forward consumers will be looking for named ingredients such as L-Theanine and Catechins as their understanding of what these components provide grows. We need to build on this knowledge, noting that authorised on-pack claims could improve consumer trust and confidence, but they will need to be based on robust data and communicated in a language consumers understand.

A the 'New Year meet up for Global Tea People' hosted by China, the hosts announced a project to collate tea health research from around the world and provide a platform for information sharing. This is a welcome initiative and one that UKTIA will be happy to support. We will share all the links to the Tea Advisory Panel (TAP) research that has been funded via the UKTIA unrestricted education grant, as we continue our commitment to promote the health credentials of tea and HFIs.

2021 was one of our most successful years ever in terms of media reach for the UKTIA sponsored TAP research. The publication of the TAP report 'Tea Through the Ages', based on the research paper 'Tea and Wellness throughout Life' , coincided with a UK Government release on targets for reducing sugar in children's diets. Our simple message of the benefits of tea drinking for all ages from 4 years old to pensioners, landed well and journalists focussed on the fact that tea was an excellent swap for sugar sweetened beverages, especially for young children. This achieved front page coverage, featuring an iconic picture of a young girl enjoying a cup of tea, and put tea right at the heart of the national conversation and beyond. This TAP report continues to deliver value, and we have more press releases and social media work planned which will focus on the benefits of tea for other age groups.

Also published in 2021 was the TAP paper on 'Tea for Sport and Fitness' which evaluated the roles of tea in relation to aspects of sports and fitness performance. The fitness industry, and the accompanying health food and drink market, is worth billions in the UK alone and the opportunities to promote the benefits of tea for pre and post workout hydration are vast. The sports energy drink market is also worth millions and concerns over excessive sugar and caffeine, put tea in pole position as a sugar-free alternative that has moderate caffeine.

TAP has already published a new research paper in 2022 on the role of tea in mental wellbeing and cardiovascular health . The evidence suggests that drinking black tea could benefit markers of heart health and both black and green tea could aid relaxation, lower stress, dementia risk, cognitive decline and potentially improve attention and psychomotor speed in advanced age. We anticipate this will achieve extensive media pick up and we will continue to build on this success throughout the year.

TAP papers are published in open access journals so the global tea community can join us in promoting the benefits associated with consuming tea.

**Final word**

We look forward to further collaboration with the global tea community as we share the positive messages about tea's goodness within the broadest definition of that word. Tea is many good things; it's tasty, refreshing, hydrating, and healthy, as well as part of the sustainability conversation. Let us all continue to talk tea!



盖普瑞拉·隆巴尔迪

盖普瑞拉是欧洲第一位加拿大茶叶与花草茶协会认证专业茶艺师。

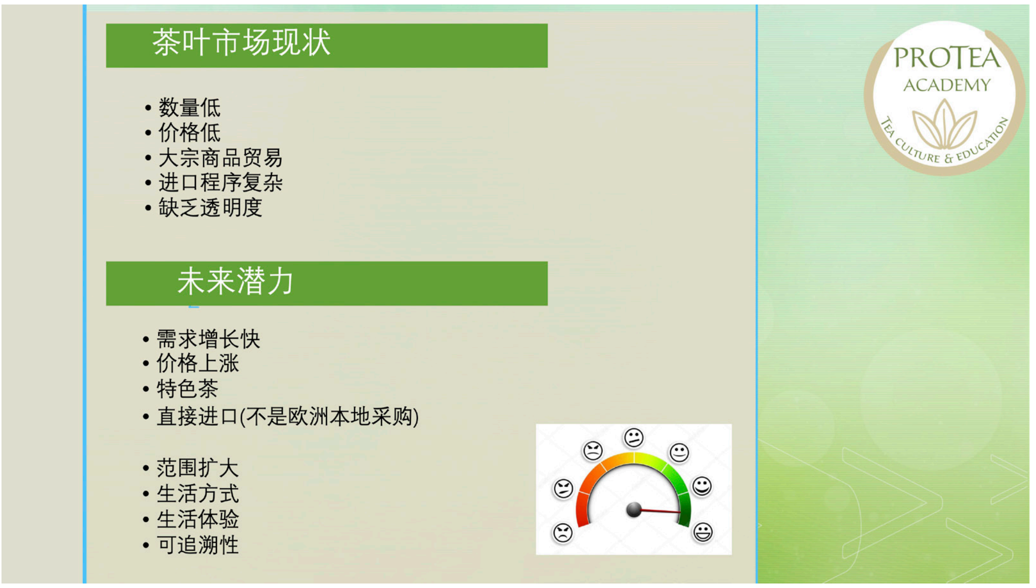
她是《茶艺师》的作者，由意大利白星出版社出版，有英语、法语、德语、西班牙四种版本。

Protea 培训学院主席和联合创始人，这是一家致力于推广茶叶文化和专业茶叶技能培训的非营利性组织。

Protea 培训学院 TAC 茶艺师课程的负责人，该课程是经加拿大茶叶与花草茶协会认证的。

她还是意大利茶艺大师杯比赛的国际协调员，该比赛是为拥有高雅品味的茶叶专家所举办的国际性茶叶赛事。

# 意大利茶叶市场



## 3 不同茶叶爱好者的特征

他们对茶的理解各有不同，对于茶体验的需求各有不同 …

### 传统主义者

他们喜欢传统茶，他们不喜欢太古怪的探索。他们在茶叶评估方面具有基本的专业知识。

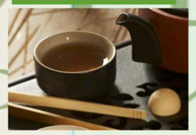
对他们来说，茶是英国的传统。他们喜欢印度红茶、锡兰红茶以及拼配茶（伯爵茶、英式早茶），其他的不是茶，而属于其他类的饮料。

### 世界主义者

他们对所有茶叶变化都非常开放，喜欢探索和体验茶作为长时间的休息时间，就像在星巴克或类似的咖啡馆里发生的那样，他们是这些咖啡馆的常客。

他们喜欢尝试不同的香味茶或时尚食谱：抹茶拿铁，柴拿铁，珍珠奶茶，新口味的茶。喝茶是一种不同的体验，一种缓慢而轻松的停顿。

### 纯粹主义者



他们是茶叶鉴赏家和专家，喜欢优质茶提供的精致风味，并寻求更微妙的感官体验。

随着茶叶受欢迎程度不断上升，市场出现了越来越多的优质茶叶零售商。饮茶者的味觉不断发展，当高品质的茶与简单的全叶或香味的茶相比时，他们找的都是“优质”茶（不是特种茶）。

## 散叶茶和袋泡茶市场

创新很重要，但是口味是主要驱动因素

创新能让我们探索未知，激发好奇心

但是这些创新需要:

- 感官研究
- 避免传递添加风味的概念——无添加或清洁标签趋势
- 提供原因
  原材料，如“葡萄酒”叙事方式（例如。植物与环境共生、酸性土壤与树木、草药、浆果、阳光等。）
- 生产过程(如发酵:将复杂的淀粉转化为更简单的糖，产生更多的化合物，如柠檬酸等)

## 即饮茶市场

### 创新的解读：

• 零糖:

I. 红茶份额占瓶装RTD市场的90-95%，大部分加了糖，剩余份额归属绿茶

II. 零糖不超过10/15%。因为人们认为茶是非常健康的

- 是仅次于水的第二健康的饮料。

•关注可持续性

I.另一个有趣的趋势是饮品小型化。如今市场正在转向400毫升单瓶，而不是500毫升，部分原因是为了降低成本(不需要提供500毫升装)以及减少塑料。

II. 家庭外消费的增长

• 清醒好奇的消费者

I. 市场高端化，推出250毫升的不可回收玻璃瓶装，以应对低/无酒精（优质）开胃酒的新兴趋势。事实上，消费者认为玻璃瓶能更好地保持味道。





**Gabriella Lombardi**

*The first professional Tea Sommelier in Europe, certified by the Tea and Herbal Association of Canada.*

*Author of the book Tea Sommelier, published by White Star, translated into English, French, German and Spanish.*

*Co-founder and president of Protea, a non-profit association dedicated to the promotion of tea culture and professional training.*

*Head of Protea Academy for TAC Tea Sommelier courses in collaboration with the Tea and Herbal Association of Canada.*

*Coordinator for Italy of Tea Masters Cup International, an international competition in which tea experts with refined taste compete.*

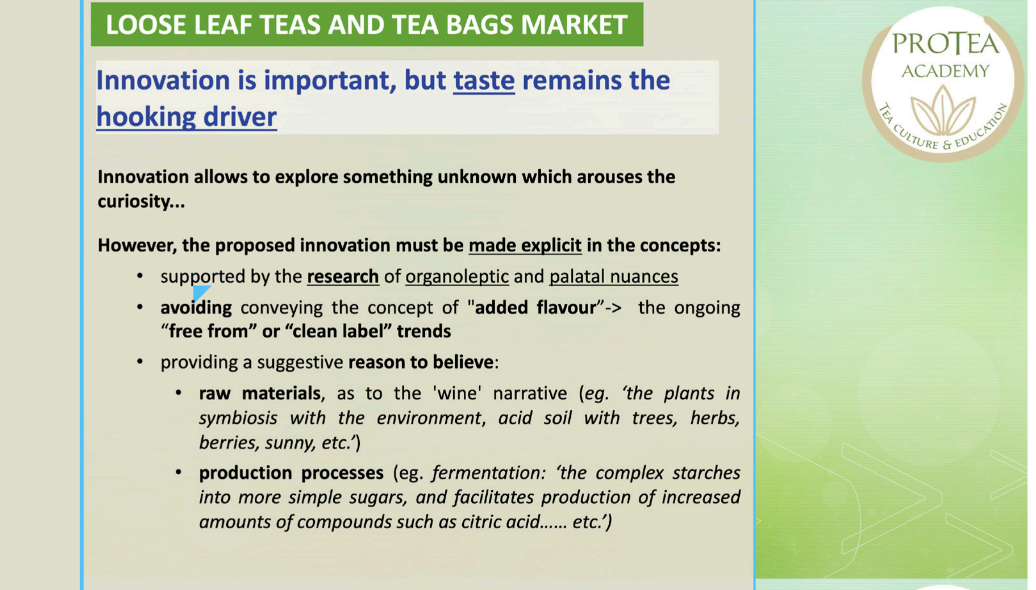
# The Italian Tea Market

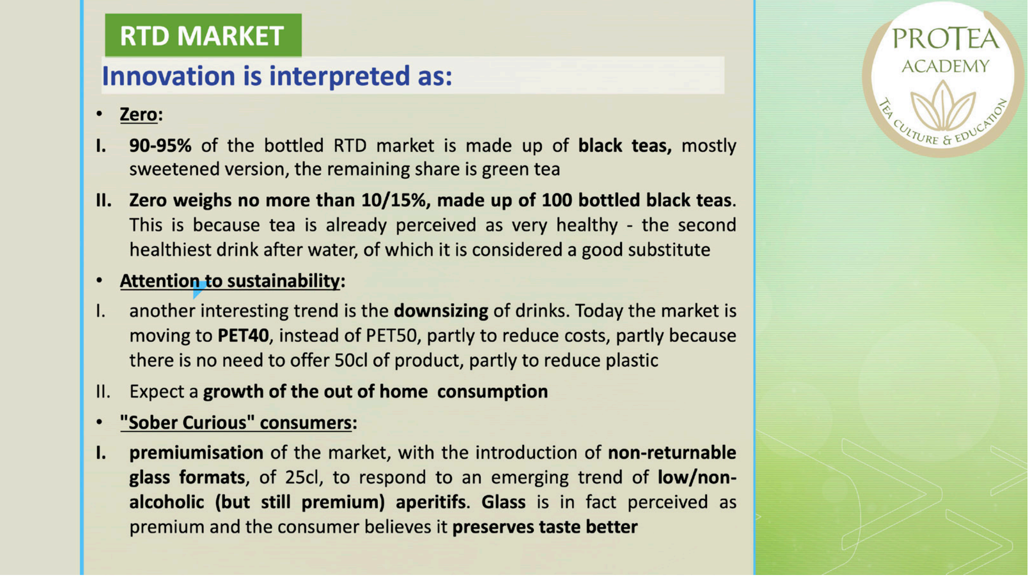
## CURRENT TEA MARKET

- Low volume
- Low prices
- Commodity business
- Complex import procedures
- Lack of transparency

## FUTURE POTENTIAL

- Fast growing demand
- Higher prices
- Specialty business
- Direct import
  (instead of local European sourcing)
- Improved range
- Lifestyle
- Experience
- Traceability


芭芭拉 . 杜福雷恩

芭芭拉 . 杜福雷恩 | 邮箱：b-dufrene@orange.fr

• 法律博士学位：奥地利维也纳大学，

• 工商管理硕士学位：法国巴黎索邦大学

芭芭拉曾在几家法国食品公司工作三年，主管市场调查和市场监管工作。之后又相继管理多家重要的欧盟食品工业联合会，主管可可、巧克力、咖啡与茶饮业务：

**1973-1984：欧盟巧克力饼干和糖果行业联合会 (CAOBISCO)

** 1992-2004：欧盟茶业：欧洲茶叶委员会 (ETC)

**1990-2006：欧盟咖啡研究与贸易联合会、咖啡科学信息研究会（ASIC）、PEC（咖啡生理效应研究组）、咖啡科学资讯学会（ISIC）

**1985-2011：欧盟脱咖啡因者协会

过去 10 年：

**《茶叶 & 咖啡行业杂志》的自由撰稿人，主笔茶情方向；

** 提供茶叶及咖啡类的公众教学课程；

** 频繁出差，到产茶国作会议报告；

** 为高级茶饮和精选咖啡行业提供公关咨询服务。

2010 年 7 月，芭芭拉发布了名为《La Nouvelle Presse du Thé》的法文电子简报，主要围绕好茶的原产地、茶叶教育和国际茶叶市场展开讨论：

http://nouvellepresseduthe.blogspot.com

http://nptdumois.blogspot.com

# 法国的茶叶市场

首先，我们应该知道法国人是一个庞大的咖啡消费群体。从殖民时代开始，法国人就在中美洲和南美洲地区传播咖啡文化，随后也传播到了越南和非洲。1904 年前后，法国人田德能（Alfrèd Liétard）将咖啡树引入云南。然而，当茶叶到达欧洲时，早在 17 世纪 30 年代，第一批商品茶叶就通过港口城市洛里昂进口到法国。

从遥远的中国和其他南亚国家进口和交易茶叶、胡椒和肉豆蔻等香料需要皇家特许，在 17 世纪时仅特许授予某些商人家族；其中一些姓氏，如“玛黑兄弟”（Mariage Frères）和“苾蔓兄弟”（Damman Frères）已成为法国的标志性茶叶品牌，在国际市场上也享有盛誉。

## 市场格局

从茶叶市场的数据可以看出，法国的茶叶消费量一直非常稳定，净进口量从 2012 年的 14,730 吨到 2021 年的 14,770 吨，非常稳定。

通过线下茶叶店和在线目录也可以看出，尽管进口量非常稳定，但质量却有了显着的提升。许多小型茶商在高端市场非常积极，通常直接从原产地采购茶叶，比如中国、越南、日本、中国台湾、印度、斯里兰卡和东非。这些优质茶叶中有一些还出口到欧洲邻国，这解释了为何法国茶叶出口单价以 15.64 美元 / 千克位居全球第二，仅次于日本的 28.86 美元 / 千克，位列台湾的 12.84 美元和德国的 10.16 美元之前。

在这个对比鲜明的市场中，有三分之二的销量被主流跨国茶叶品牌，如立顿（Lipton）、泰特莱（Tetley）和川宁（Twinings）以及超市自有品牌瓜分。剩余的三分之一则属于历史悠久的茶叶贸易家族建立的著名私有品牌，如莯蔓（Damman）、玛黑（Mariage）、Kusmi 和乔治·坎农（G. Cannon），以及中国改革开放之后较新成立的茶叶公司，如“茶宫”（Palais des Thés）和“盖亚花园”（JardinsdeGaïa）等。剩余部分的则是一些茶叶零售商，它们更专注于小批量高价值的优质茶叶进口和零售，通常只有一两家门店，还有很多仅在线上销售。

## 茶叶进口和再出口

2020 年，法国茶叶进口总量已从绿茶和红茶的“平分秋色”变为绿茶占 57%，红茶占 43%。第一大进口来源国是中国，有一半的绿茶进口自中国。中国也是最大的红茶进口来源国，其次是印度和斯里兰卡。

2020 年统计数据显示，法国茶叶进口总计 17,520 吨，其中 3,400 吨再出口，剩余 14,120 吨被国内消费。

注意：引用的所有统计数据均来自国际茶叶委员会（ITC）官方出版物。

## 法国茶叶市场的显著特点

值得一提的是，法国公司“玛黑兄弟”（Mariage Frères）在 1980 年推出了豪华或单一产地的茶叶与高档外形的茶杯，彻底改变了茶叶的形象。他们的品牌战略和包装风格被他们的前雇员采用，并继续以其优雅的特点吸引零售客户。他们营销单一产地和原产地茶的开创性方法已被其他后来经营者采用，从而为消费者提供了许多优质的茶产品。随后，“茶宫”（Palais des Thés）于 1999 年在巴黎开设了第一所茶艺学校，来自欧洲各地的茶友们纷纷加入这个为期一周的高级茶艺课程。

法国在时尚、烹饪和饮料领域拥有极佳的形象，这帮助茶叶公司在推出新产品时产生了重要的反馈和共鸣。因此，雀巢在 2012 年推出的 Special T. 和联合利华在 2015 年推出的使用茶胶囊的电动冲泡设备 T. O. by Lipton 都选择在巴黎发布，这两个产品预算惊人，但从长远来看都没吸引到传统茶叶的消费者。

此外，法国人欣赏来自特定来源地的优质食品的方式也衍生出很多针对精美食物和茶叶而设立的赛事。首先，巴黎当地成立了“农产品价值评估机构”（AVPA），这是一个非营利性机构，它邀请优质食用油、咖啡和茶叶生产商提交样品，然后开展品尝和质量评估环节：一个专业的评审团对它们进行评估、排名和遴选，为他们授予美食资格和奖牌。第四届“世界之茶”竞赛收到了来自多个原产国提交的近 300 份样品。竞赛于 2022 年 1 月公布了获奖名单。

https://www.avpa.fr

随后，日本农业部为了推广日本的优质茶叶，在巴黎发起了另一场茶叶比赛。评审团由茶叶专家、茶叶零售商和厨师组成。这些精品茶包含了各种类别的日本茶，由日本所有茶叶产区的生产商提交。2022 年 1 月，第四届巴黎日本茶评选大赛在日本大使官邸公布获奖名单，第五届评选也即将开幕。

## 法国的茶叶种植

20 世纪初，海外华人将茶叶引进印度洋上的法国留尼汪岛。这种以红茶为主，用香草调味的饮品，受到当地消费者的高度赞赏。

此外，随着全球气候变暖，法国大都市区西海岸的小块地区已经开始种植一些茶叶，那里温和多雾的微型气候吸引了年轻热情的茶迷们种植、培育茶树，计划在未来几年内实现商业收成。虽然至今产量仍然不高，但他们的努力和知识却令人印象深刻，这些法国本土种茶先驱值得赞扬和鼓励。他们创建了“法国茶叶种植者协会”，并与葡萄牙、格鲁吉亚、荷兰、英国、德国和瑞士一起组建了“欧洲茶叶种植者协会”。

http://tea-grown-in-europe.eu/

## 前景展望

许多热爱茶叶的专业人士对目前的现状颇感失望，因为缺乏促进茶叶消费的推广和整体手段。但今天的法国茶叶市场相当活跃，消费者也在不断寻找新的、美味的、健康的、令人兴奋的、异国情调的茶叶。许多人认为茶叶市场仍存在巨大的增长潜力，他们也在寻找乐于创新、积极进取的同行和市场运营商，共同建立一个拥有统一质量要求和质量标签的体系，以创造公平的竞争环境。

*Barbara DUFRENE, LD | e-mail : b-dufrene@orange.fr*
*•Law Doctorate: University of Vienna (Austria),*
*•Post graduate degree in Business Administration (IAE): Sorbonne V, Paris (France)*
*After 3years in charge of regulatory and market survey issues for French Food Companies,*
*appointed to run several important EU Food Industry Federations involved respectively with Cocoa and Chocolate, Coffee and Tea:*
*** EU Cocoa Chocolate Confectionery Federation (CAOBISCO) from 1973-1984*
*** EU Tea Industry: European Tea Committee (ETC) from 1992-2004*
***EU Coffee Science and Coffee Trade Federations, ASIC, PEC, ISIC from 1990 - 2006*
***European Decaffeinators' Association, 1985-2011.*
*For the past 10 years:*
*** free- lance writing namely as tea writer for" Tea& Coffee Trade Journal"*
*** tea and coffee teaching sessions for the general public;*
*** frequent travels to tea producing countries with conference presentations;*
*** PR and counselling for gourmet teas and specialty coffees.*
*In July 2010 launch of a French language electronic newsletter*
*" La Nouvelle Presse du Thé",*
*with the main focus on fine origin teas, tea education and the global tea market:*
*http://nouvellepresseduthe.blogspot.com*
*http://nptdumois.blogspot.com*

***Barbara Dufrene***

# The Tea Market in France

To set the scene it should be recalled that the French are great coffee drinkers; from the start they have been instrumental for spreading the coffee culture in Central and South America during the colonial times, later on also in Vietnam and in Africa. It was a Frenchman, Tian Deneng (Alfrèd Liétard) who is reported to have introduced the coffee plant to Yunnan around 1904. However, when tea arrived in Europe, the first commercial tea imports into France came through the port city of Lorient in the 1630 ties.

Importing and trading tea together with spices, like pepper and nutmeg, which arrived from far away China and other South – Asian countries was a Royal privilege, that was granted exclusively to certain merchant families during the 17th century; some of these family names, like "Mariage Frères" et "Damman Frères" have become iconic tea brands in France, well known also in the international market.

## Market pattern

Checking out tea market data, one can see that the French tea consumption has remained very stable in volume, with net imports unchanged from 14,730 metric tons in in 2012 to 14,770 metric tons in 2021.

Visiting the tea shops and perusing the online catalogues one can also see that in spite of a very stable volume there is a sig-

nificant quality upgrading. There are many small operators who are highly pro- active in the premium segment, often sourcing directly from origin, namely from China, Vietnam, Japan, Taiwan, India, Sri Lanka and also East Africa. Some of these premium teas are also exported to European neighbors, and this will explain, why the unit value of French tea exports is the 2nd highest worldwide with US$ 15,64/kg, ranking second after Japan, which boasts a US$ 28,86/kg, but before Taiwan: US$ 12,84 and Germany: US$ 10,16.

This rather contrasting market is shared out between the multinational mainstream tea brands, Lipton, Tetley and Twinings together with the supermarket own brands, who are representing over two thirds of the sales volume. The prestigious private brands, namely those built up around historical tea trade family names, like Damman, Mariage, Kusmi et G. Cannon together with the more recently founded tea companies, who were launched in the wake of China's reopening to the world, namely "Palais des Thés" et "Jardins de Gaïa" represent around one third of the sales volume. The balance is made up by a growing number of small volume but high value tea operators who focus on premium tea imports/ retail, often just with one or two tea shops and quite a few with on line sales only.

## Tea imports and re – exports

French tea imports in total have moved from "half and half "for green and black teas to a 57% share of green tea and 43% of black tea in 2020. The number one origin country is China, from where half of the green teas are sourced and also the biggest share of black teas, followed by India and Sri Lanka as the other main black tea origins.

For year 2020 the French tea import statistics show a total of 17,520 metric tons, of which 3,400 metric tons are re-exported, which leaves a balance of 14,120 mt for domestic consumption.

NB: all statistical data quoted are taken from official ITC publications.

## Salient features of the French tea market

Maybe it is worthwhile to recall that it was the French company Mariage Frères who completely revamped the image of tea by launching the luxury /single origin and premium profile cups in the 1980. Their branding strategy and packaging style have been picked up by some of their former employees and continue to fascinate the retail customers with their magic elegance. Their pioneer approach of marketing single origin and terroir teas has been picked up by other newly arriving operators, thus offering the consumers the access to many exceptional cups. Following suite, it was "Palais des Thés" who launched the first tea school in Paris, with keen

tea lovers to flock to this high quality one week tea courses from all over Europe since 1999.

France has an immensely attractive image in the spheres of fashion and culinary food and drink, which allows to generate significant feed- back and resonance for the launch of novelties. Hence both the electric brewing devices using tea capsules, as introduced by Nestlé in 2012, the Special T. and by Unilever in 2015, the T.O.by Lipton, have been launched in Paris, with impressive budgets, although neither has been able to successfully convince the traditional tea consumers in the long term.

Furthermore, the French ways to highlight and appreciate quality food sourced from specific and defined origins has attracted award giving competitions for fine foods and fine cups. The first step was the launch of the "Agency for the Valorization of Products of Agriculture" – AVPA, in Paris, a not- for- profit structure, that has invited producers of premium edible oils, then coffees and then teas to submit samples for tasting and quality evaluation sessions,; a professional jury then proceeds with assessing, ranking and selecting the best, for awarding them with gourmet qualifications and medals. Thus the 4th contest for "Teas of the World", which has received close to 300 samples submitted from many origin countries, has announced it's list of awards in January 2022. https://www.avpa.fr

Another tea competition has been launched in Paris by the Japanese Ministry of Agriculture in order to promote Japan's premium teas, with a jury consisting of tea experts, tea retailers and chefs. These fine teas represent all the categories of Japanese teas and are submitted by producers from all the Japanese tea regions/areas. The 4th Japanese Tea Selection Paris has announced the winners at the Japan Ambassador's residence in January 2022, and the opening of the 5th selection will be called up soon.

## Tea growing in France

Tea cultivation has been introduced in the early 20th century by the overseas Chinese to French island La Réunion, located in the Indian Ocean. This production of mainly black tea, often flavored with Vanilla, is highly appreciated by the local consumers.

Furthermore, with the weather patterns undergoing global warming, some tea growing has started on small territories close to the West coast of metropolitan France, where misty and temperate micro climates have tempted young and passionate tea addicts to plant and rear tea bushes with the objective to achieve commercial harvests within the next years. To date the output is still not significant, but the efforts and the knowledge involved are truly impressive and these French tea pioneers deserve to be hailed and encouraged. They have come together under the banner of the "French Tea Growers Association" and as such are in membership with the "European Tea Growers Association", together with Portugal, Georgia, the Netherlands, UK, Germany and Switzerland. http://tea-grown-in-europe.eu/

## Outlook

Many tea professionals who love their cups, feel frustrated by the lack of promotion and the absence of structured means, which would help to foster increased tea consumption. There is quite a buoyant tea market in France today, with consumers constantly looking for new, tasty, healthy, exciting, exotic and delicious cups. Many consider that there is a significant potential for growth and are on the look- out for innovating and motivated colleagues and market operators who would be available to set-up a framework of agreed quality requirements and quality labels in order to fuel healthy competition within a level playing field.



拉马兹·钱图里亚

拉马兹·钱图里亚（第三代茶叶专家家族）自 1991 年以来一直从事茶叶行业，在茶叶产品的生产和销售方面具有丰富的经验。

从 1999 年至今，他是俄文商业杂志《俄罗斯的咖啡和茶》的主编，该杂志在整个前苏联时期都很流行。从 2001 年至今，他一直担任俄罗斯茶与咖啡生产者协会总干事。从 2011 年至今，他在商品共同基金咨询委员会中代表俄罗斯联邦，负责茶叶和咖啡领域的工作。2013 年，他创立并担任国际茶叶领域专业竞赛 - 茶艺大师杯的主席。

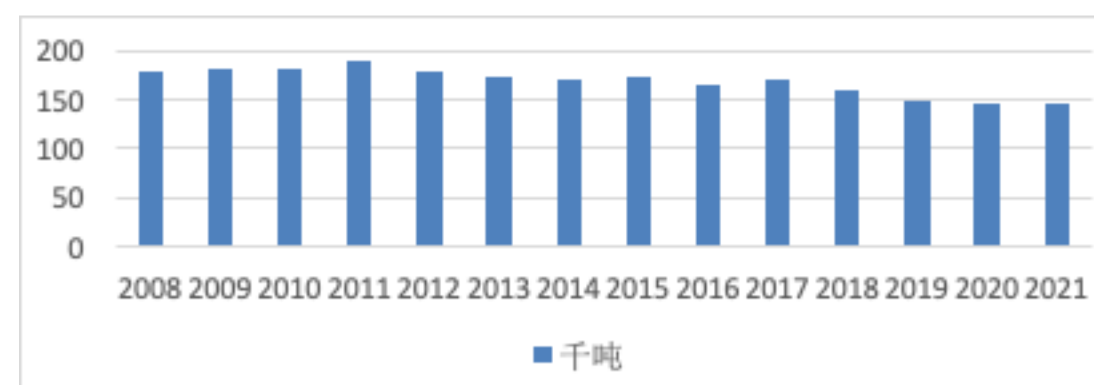
俄罗斯茶与咖啡生产者协会是一个在俄罗斯农业部的支持下，由主要茶叶企业于 1999 年成立这个非营利性组织，目前有 27 家会员企业，它们控制着俄罗斯超过 75% 的茶叶与咖啡市场。协会为行业利益开展游说活动，负责技术法规问题，开展国际交流并以此为基础推广茶叶、咖啡和饮料。

商品共同基金是一个在联合国框架内建立的自治政府间金融机构。联合国贸易和发展会在 1976 年至 1980 年间展开谈判并达成了《建立商品共同基金协定》，该协定于 1989 年生效。第一个商品发展项目于 1991 年获得批准。

茶艺大师杯是一个国际性比赛系统，在 26 个国家 / 地区拥有国家团体，并且已经成为茶叶市场不同领域的专业人士与专家的“奥林匹克运动会”。

# 俄罗斯茶叶市场：停滞还是实体改变？

在过去的 30 年里，俄罗斯茶叶市场已经形成了良好的结构。这些年来，俄罗斯每年进口的纯茶在 15 万 -18 万吨的范围内波动。然而，在过去的 10 年中，俄罗斯的纯茶进口量逐渐减少。



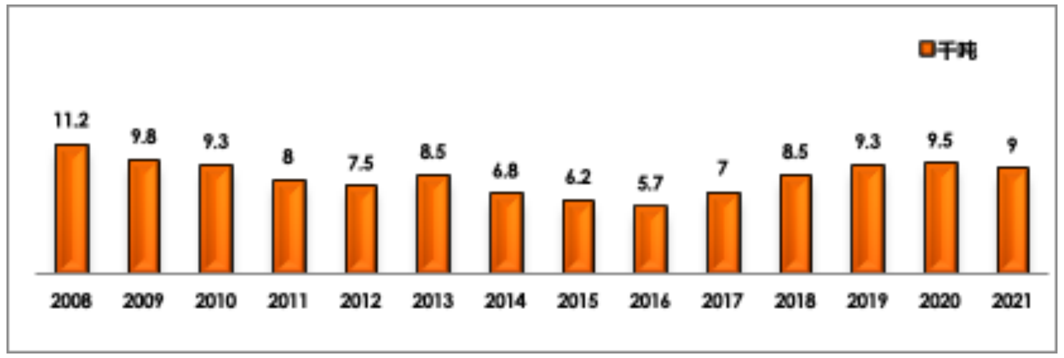

2021 年，茶叶进口量为 14.49 万吨，同比下降 1.3%，其中红茶进口占 89.1%，茶叶进口均价为 2.77 美元 / 千克，同比上涨 5.4%。

**俄罗斯的 6 大传统茶叶来源国**

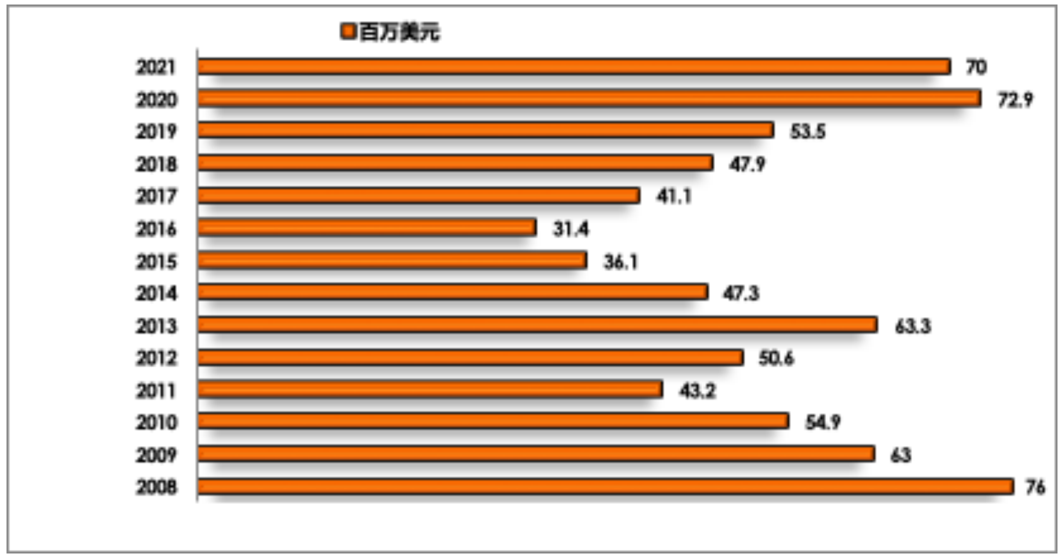

有两个国家的进口量在逐渐下降，肯尼亚成为疫情的主要赢家。

俄罗斯有这很强大的茶叶包装工业基础，因此，89.6% 的茶是以散茶的形式进口到俄罗斯。

俄罗斯茶叶行业既服务于本国市场，又供出口。近年来，包装茶出口已经成为许多俄罗斯茶企的首要发展方向（详见下图）。




供出口的包装茶均价为 7.77 美元 / 千克，2021 年出口额稍有下降（详见下图）：




尽管俄罗斯的纯茶消费在下降，但由于风味茶、伊万茶等产品需求不断上涨，茶产品消费量相对稳定。这也表明茶叶消费模式在改变，纯茶受欢迎程度在下降，而那些不含茶叶的茶饮料却受到追捧。

俄罗斯以及其他国家的茶叶市场面临的主要问题是，茶叶在消费者心目中的价值在下降，茶叶市场需要使用现代传播理念，去打造一个旗舰市场部门。

***Ramaz Chanturiya***

*Ramaz Chanturiya*

*The third generation of tea specialist's family.*

*Has been engaged in tea since 1991, has experience in the production and marketing of tea products. From 1999 to the present day, he is the Chief Editor of the Russian-language business magazine "Coffee & Tea in Russia", which is popular throughout the entire former Soviet Union. From 2001 to the present day he has been working as the General Director of the Russian Association of Tea and Coffee Manufacturers (Association "Rusteacoffee») *. From 2011 to the present day, he has represented the Russian Federation in the Consultative Committee of the Common Fund of Commodities *, in which he is responsible for the tea and coffee industry. In 2013, he founded and headed as a Chairman the international system of professional competitions in the field of tea - Tea Masters Cup **

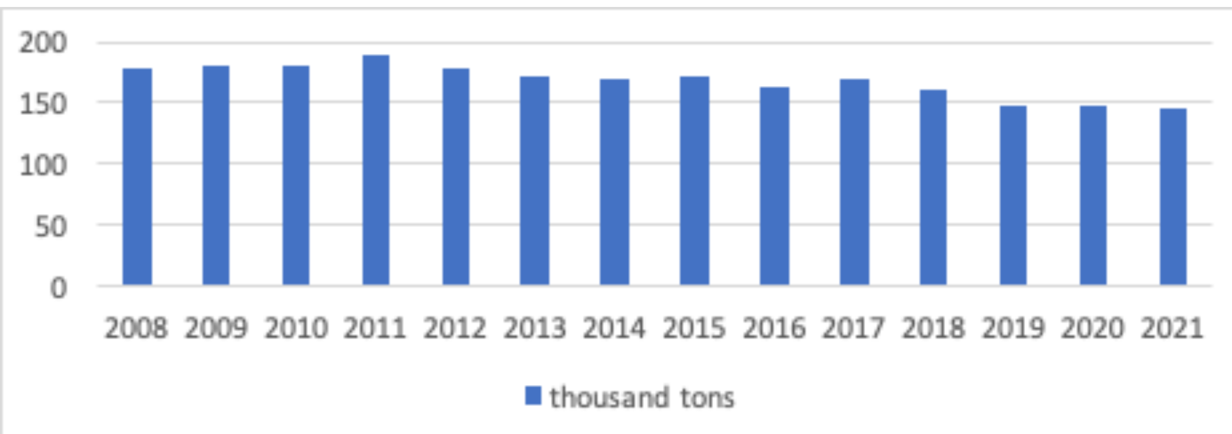
** Association Rosteacoffee (https://rusteacoffee.ru) is a non-profit organization founded in 1999 under the auspices of the Ministry of Agriculture of the Russian Federation by leading Russian tea companies. Currently, 27 companies are members of the Association, which in total control over 75% of the tea and coffee market in Russia. The association lobbies for the interests of the industry, is responsible for technical regulation issues, carries out international communications, and also promotes tea, coffee and drinks based on them.*

** Common Fund of Commodities (https://www.common-fund.org) is an autonomous intergovernmental financial institution established within the framework of the United Nations. The Agreement Establishing the Common Fund for Commodities was negotiated in the United Nations Conference on Trade and Development (UNCTAD) from 1976 to 1980 and became effective in 1989. The first commodity development project was approved in 1991.*

** Tea Masters Cup (https://teamasterscup.com) is an international system of competitions that has national body in 26 countries and has become the Olympic Games among tea professionals/specialists from different segments of the tea market.*

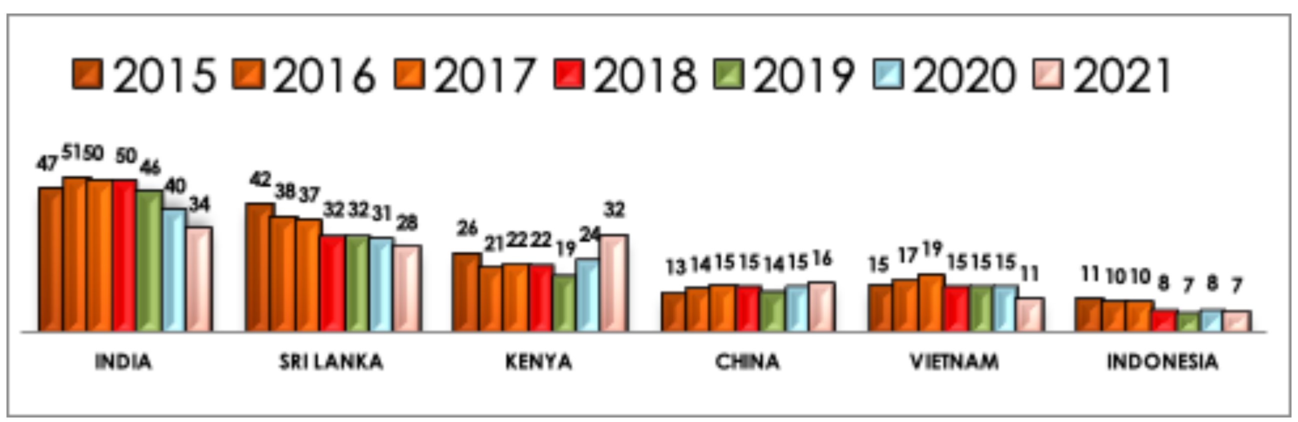
# Russian Tea Market: Stagnation or Entity Change?

Over the past 30 years, the Russian tea market has become well-formed and structured. During these years, the volume of the annual import of pure tea into the country fluctuated within the range of 150-180 thousand tons. However, over the past 10 years, we have seen a gradual decrease in the import of pure tea into the country.




In 2021 import of tea in weight terms decreased by 1,3% and become 144,9 thousand tons, among which the share of black tea is 89,1%. Average indicative price of imported tea is 2,77 $/kg (+ 5,4%).

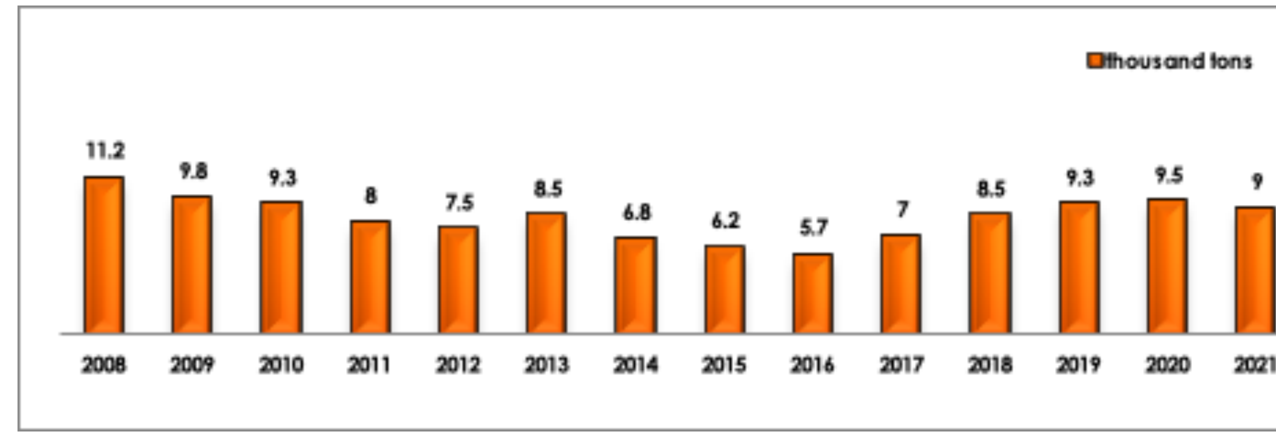
**Traditionally Russia importing tea from 6 tea production countries**



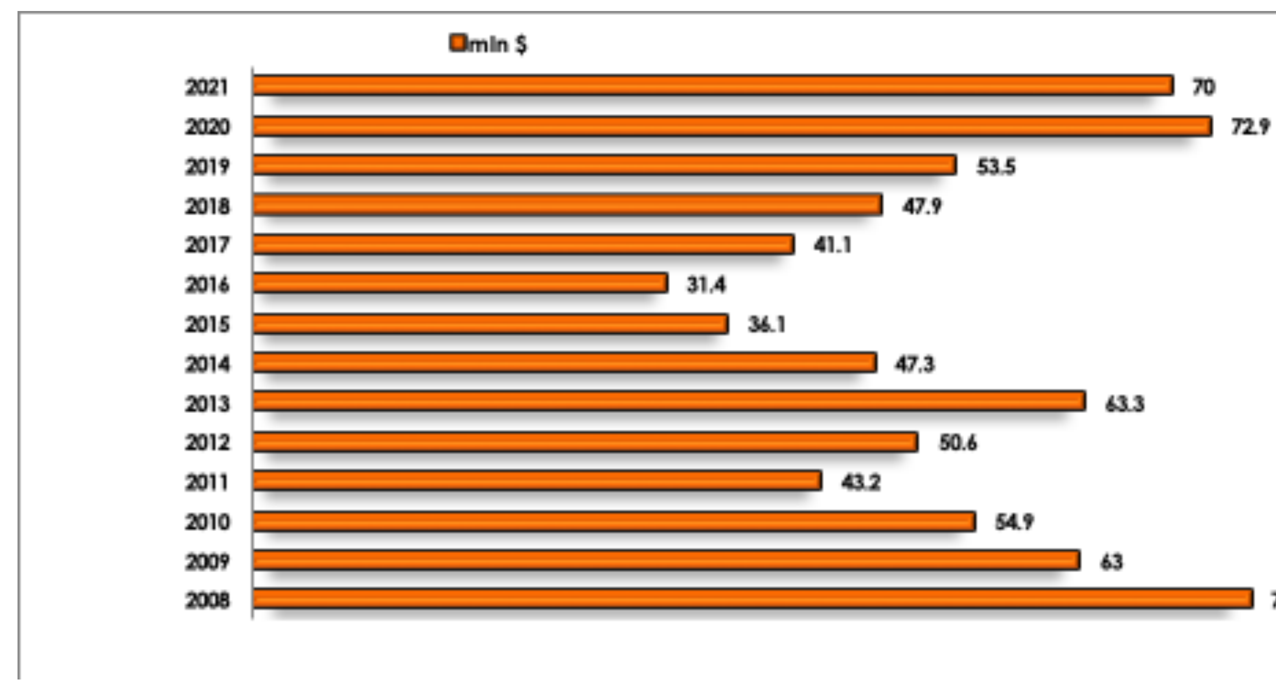

At the same time the share of 2 traditional suppliers is steadily declining and Kenya become the main beneficiary of the pandemic.

Russia has a powerful tea-packing industry, therefore 89,6% is imported into the country as a bulk (+1,1%)

The tea industry works both for the domestic market and for export. In recent years, the export of packaged tea has become a priority development area for many Russian tea companies (look on picture below).




The average indicative price of packaged and exported tea become $ 7.77 / kg. The value of export shrinks a little:




Although the consumption of pure tea in Russia is decreasing the consumption of tea products is relatively stable due to the growing demand for flavored teas, teas with additives, Ivan-tea, etc. This may indicate that tea consumption is changing its essence - pure tea is losing its popularity, giving way to tea with additives or drinks where tea is not contained at all.

The main problem facing the tea market in Russia (and in other countries), is the loss of the value of tea in the minds of consumers. The market needs to have a flagship market segment using a modern communication concept.

1965 年，哈桑·昂德出生于土耳其黑海沿岸位于里泽港的茶乡。1989 年，他从伊斯坦布尔大学毕业后从事旅游行业，也从事进出口贸易行业长达 10 年之久。

2009 年，他加入里泽商品交易所（土耳其最重要的茶叶组织之一），担任总协调员。他还将担任茶叶市场的总经理。茶叶市场将于 2021 年 8 月在土耳其里泽开业，市场内有茶叶博物馆、茶店、饭店等，还会举办其他文化活动。

为推广土耳其茶叶和茶文化，他曾参加多国举办的茶叶会议，包括阿联酋、伊朗、中国、韩国、斯里兰卡、日本、肯尼亚、俄罗斯、白俄罗斯、越南以及欧洲各国。

他兴趣爱好广泛，如登山、露营、漂流、摄影。他是土耳其登山协会、摄影协会、漂流裁判协会的会员，还是土耳其茶艺大师杯国际比赛的代表。他能说 5 种语言，包括土耳其语、俄罗斯语、英语、格鲁吉亚语、拉兹语。

哈桑·昂德

# 2021 年土耳其茶产业

土耳其是茶叶生产大国之一，人均消费量接近 3.7 公斤。它是土耳其黑海地区经济中非常重要的一部分。

## 疫情之下的茶叶生产

疫情之下，由于外国采茶工无法入境，茶叶采收出现了一些问题，茶农就自己采摘。另一方面，气候不太适合茶叶生长，但由于开辟了新的茶园，2021 年茶青采摘量还是去比年多了 7%。

2021 年，采摘茶叶鲜叶 1,455,947,483 公斤，比上年多 10,766,345 公斤。土耳其生产了 28.2 万吨红茶和绿茶（占总产量 2%）。

由于疫情，户外消费疲软，但总体消费保持正常，仓库库存没有大量积压情况。

2021 年，土耳其出口茶叶 5,790,768 公斤，同比增长 18%；茶叶进口量为 19,864,445 公斤，同比下降 7%。

T.C.
RİZE TİCARET BORSASI
(RİZE COMMODITY EXCHANGE)

2021 年土耳其茶叶产量（茶青 – 红茶）
（私营和国有企业茶叶产量）

| 年份 | 茶青（千克） | | 红茶 MT | | 总产量 MT |
|---|---|---|---|---|---|
| 2021 | 私营： | 595,448,793 | 私营： | 115,302MT | 282,068MT |
| | 国营： | 860,383,368 | 国营： | 166,726MT | |
| 2020 | 私营： | 692,755,790 | 私营： | 134,202 MT | 280,364 MT |
| | 国营： | 752,424,762 | 国营： | 145,817 MT | |
| 2019 | 私营： | 658,916,874 | 私营： | 125,117 MT | 267,804 MT |
| | 国营： | 750,327,232 | 国营： | 142,687 MT | |
| 2018 | 私营： | 741,091,868 | 私营： | 140,807 MT | 279,998 MT |
| | 国营： | 732,585,544 | 国营： | 139,191 MT | |
| 2017 | 私营： | 746,133,508 | 私营： | 152,957 MT | 255,403 MT |
| | 国营： | 525,362,536 | 国营： | 102,446 MT | |
| 2016 | 私营： | 611,524,799 | 私营： | 119,247 MT | 253,312 MT |
| | 国营： | 687,515,088 | 国营： | 134,065 MT | |
| 2015 | 私营： | 644,932,518 | 私营： | 125,761 MT | 258,541 MT |
| | 国营： | 680,920,610 | 国营： | 132,779 MT | |
| 2014 | 私营： | 635,472,391 | 私营： | 123,917 MT | 246,463 MT |
| | 国营： | 628,442,391 | 国营： | 122,541 MT | |
| 2013 | 私营： | 503,835,933 | 私营： | 100,767 MT | 235,208 MT |
| | 国营： | 672,208,051 | 国营： | 134,441 MT | |
| 2012 | 私营： | 497,506,122 | 私营： | 99,501 MT | 230,558 MT |
| | 国营： | 655,285,218 | 国营： | 131,057 MT | |

*Mr. Hasan Onder,He was born in a small tea village in 1965 in Rize on Eastern Black Sea of Turkey. 1989 he graduated from University of Istanbul. Upon graduation he worked in tourism and also was involved in import – export business for ten years.*

*Since 2009 he has been working for Rize Commodity Exchange as General Coordinator which is main tea industry authority in Turkey. He also became General Director of The Tea Bazaar where you can see Tea Museum (Tulip Shaped Tea Glass) Tea shops, tea cinema, restaurants and many other cultural activities. The Tea Bazaar is opening in August 2021 in Rize in Turkey.*

*He has taken part in many international tea events for promoting Turkish Tea and Tea Culture in many countries BAE, Iran, China, South Korea, Sri Lanka, Japan, Kenya, Russia, Belarus, Europe, Vietnam etc.*

*He has many hobbies: mountaineering, camping, rafting, photographing and member of Turkish Mountaineering Federation, Photograph Association, and Referee of Rafting Federation.*

*Representative of Tea Masters Cup in Turkey. He has good command of 5 languages Turkish, Russian, English, Georgian, Lazish.*

***Hasan Onder***

# Turkish Tea Industry of 2021

Turkey is one of large tea producer country and leader of consumption with nearly 3.7 kg per capita. it's a very important place in the economy of the Black Sea Region of Turkey.

## Tea Production of 2021 in Pandemic

In Pandemic condition tea harvesting had some problem because of foreigner tea pluckers could not passed the border. So that Tea farmers plucked own green leaf. On the other hand, climate was not much suitable for green leaf but still 7% green leaf plucked more because of new tea estates built.

Plucked 1.455.947.483 kg green leaf, 10.766.345 kg more than previous year. Produced 282 thousand tons black and green tea (% 2) in Turkey.

Out of home consumption was weak in pandemic situation but total consumption was normal and not much stock in warehouse.

Tea export is increased about % 18 and exported 5.790.768 kg, On the other hand import decreased % 7total import was 19.864.445 kg .

RİZE TİCARET BORSASI 1995 RTB

T.C.
RİZE TİCARET BORSASI
(RİZE COMMODITY EXCHANGE)

ÇAY ÇARŞISI TOBB K-Q TSE-ISO-EN 9000 caymer

**Sub: TurkishTea Production 2021** Rize, 19th February 2022

GREEN LEAF - BLACK TEA
( PIRIVATE AND STATE COMPAY PRODUCTION )

| YEAR | GREEN LEAF (KG) | | BLACK TEA MT | | TOTAL PRODUCTION MT |
|---|---|---|---|---|---|
| 2021 | Private: | 595.448.793 | Private: | 115.302 MT | 282.068 MT |
| | State : | 860.383.368 | State : | 166.726 MT | |
| 2020 | Private: | 692.755.790 | Private: | 134.202 MT | 280.364 MT |
| | State : | 752.424.762 | State : | 145.817 MT | |
| 2019 | Private: | 658.916.874 | Private: | 125.117 MT | 267.804 MT |
| | State : | 750.327.232 | State : | 142.687 MT | |
| 2018 | Private: | 741.091.868 | Private: | 140.807 MT | 279.998 MT |
| | State : | 732.585.544 | State : | 139.191 MT | |
| 2017 | Private: | 746.133.508 | Private: | 152.957 MT | 255.403 MT |
| | State : | 525.362.536 | State : | 102.446 MT | |
| 2016 | Private: | 611.524.799 | Private: | 119.247 MT | 253.312 MT |
| | State: | 687.515.088 | State: | 134.065 MT | |
| 2015 | Private: | 644.932.518 | Private: | 125.761 MT | 258.541 MT |
| | State: | 680.920.610 | State: | 132.779 MT | |
| 2014 | Private: | 635.472.391 | Private: | 123.917 MT | 246.463 MT |
| | State: | 628.442.391 | State: | 122.541 MT | |
| 2013 | Private: | 503.835.933 | Private: | 100.767 MT | 235.208 MT |
| | State : | 672.208.051 | State : | 134.441 MT | |
| 2012 | Private: | 497.506.122 | Private: | 99.501 MT | 230.558 MT |
| | State : | 655.285.218 | State : | 131.057 MT | |

大卫·维尔于的大部分职业生涯都献给了咖啡行业，2019 年 5 月担任欧洲特种茶协会执行董事后，开始乐此不疲的推广特种茶。过去三年中，他带领了一支出色的团队，并取得了优异的成绩。欧洲特种茶协会目前在不断发展，也得到了外界的尊重与认可，是茶叶行业中可靠的一员。协会正在启动一项世界级的茶叶认证计划，还与其他具有相同价值观的组织合作，并在特种茶界中共同创造和激发卓越。

大卫·维尔

# 欧洲特种茶趋势概要

欧洲特种茶协会是一个非盈利机构，协会所有权归成员，且自负盈亏。欧洲特种茶叶协会成立的愿景是建立一个包容性的，以合作、专业和知识共享为基础的会员协会。

协会旨在通过创新、研究、教育和交流，推动特种茶的发展，打造一个公平、可持续、不断成长的行业，并从会员和茶叶群体中汲取灵感和知识。

我们的成员遍布近五十个不同的国家，其中许多是志愿者，来自茶叶价值链的各个部门，从农民和生产商到出口商，进口商和贸易商、到教育工作者、研究人员和顾问、零售商、茶叶店、酒店和茶师。

欧洲特种茶协会（ESTA）重视各个层面的制茶科学和艺术。我们重视技能、奉献和关怀，并用于制作精致而独特的手工茶，也可将之归为特种茶。

我们支持特种茶行业的各个方面（从茶树到茶杯），并认可追求获得卓越的茶农。

我们还重视有助于区分特种茶和商品茶的要素，它们包括但不限于：已知的供应商、已知的农场、已知的地点、已知的生产日期、已知的加工方法。

特种茶可以通过以下 5 个标准的质量来定义：干叶、干叶的香气、茶汤的色泽和澄清度、茶汤的口味和口感，湿茶叶的外观和香气。

我们还支持使用可生物降解和环保的包装，因为这是茶叶行业未来不可或缺的一部分。

我们认为消费者需要从享受茶香、茶味的美妙时刻受到启发，赞美茶的个性、茶的起源、加工和冲泡过程中所受到的关怀。这是一个特殊的时刻。

欧洲特种茶协会也加入了建立一个有感召力的社区的行列，支持特种茶推广活动和提高茶叶质量。正因有了茶叶价值链各个层面的人们的奉献，特种茶才能够存在。我们尊重和支持采茶工、产茶人、消费者。在茶被品饮之前，所有接触到茶的人都能对这杯茶产生影响。我们的目标就是提供支持，分享知识，以促进茶叶行业。

欧洲特种茶协会重视、支持和促进具有这种奉献精神，参与并热衷于为每杯茶提供完美体验的人。

在思考何为特种茶时，我们很看重上述所有内容，我们也欢迎志同道合的人和 / 或分支机构加入我们，在不同层面上追求茶的卓越。

总之，欧洲特种茶协会支持和推广特种茶（Camellia sinensis）的活动和群体。我们还支持植物学部门作为我们组织的一部分，因为它在茶叶行业以及与茶叶爱好者和专业人士具有广泛协同作用。

我们是一个充满活力的组织，我们追求特种茶，我们的目标是对茶叶行业所有部门的福祉产生积极影响。我们认可合作的重要性，并积极寻求与我们有着同样价值观和使命的其他组织合作。

欧洲的特种茶市场很难衡量，因为从历史上看，特种茶没有一个大家都认同的定义，尽管在 2021 年，欧洲特种茶协会试图通过发布自己的定义来纠正这一点。然而，我们知道特种茶仍然只是整个茶叶市场的一小部分，数量和金额可能不会超过 5% 和 10%，特别是在俄罗斯，英国和爱尔兰等较大的消费国。然而，在上述三个市场以及德国、法国、丹麦和意大利等国，特色茶群体、文化和消费方面，都有非常可观的增长。例如，在俄罗斯，有一种非常成功的茶反正统文化，以实验和创新为其典型特征，而在英国，迅速扩大的传统下午茶市场正越来越多地转向特种茶和其他优质茶，以增强消费者体验，咖啡店除了了解到咖啡师的重要性，也认识到茶师的重要性。法国人对美食和精致佳肴的热爱也呈现在茶叶消费者身上。在意大利，“慢茶运动”反映了成熟的慢食运动。在整个欧洲，“东方咖啡仪式”正慢慢变得越来越流行。如果不提到分布在多个国家的八十个欧洲茶园，就不足以概括欧洲特种茶市场，这些茶园大多数规模很小，但根据定义，它们都在种植特种茶，也主要供本国消费。

*David Veal is currently Executive Director of European Speciality Tea Association, having taken this position in May 2019, and enjoying every minute of promoting speciality tea, having spent most of his working life in the coffee industry. He has been privileged to lead a fantastic team over the past three years, and the achievements of this team have been great. ESTA is now established, respected and recognised in the tea industry as a credible player, they are just in the process of launching a world class tea certification programme and they have collaborated with several different organisations with similar values in their mission to create and inspire excellence in the speciality tea community.*

***David Veal***

# Introduction to European Speciality Tea Association and summary of trends in Europe

The European Speciality Tea Association is a not for profit organisation limited by guarantee, owned by our members and totally inclusive.  Our vision is to be an inclusive membership-based association built on foundations of collaboration, expertise and the power of shared knowledge

Our mission is to create and inspire excellence in the speciality tea community through innovation, research, education and communication.

We are dedicated to building an industry that is fair, sustainable, and nurturing for all, and we draw on years of insight and inspiration from tour members and the tea community.

We work through our members who are based in almost fifty different countries, many of whom are volunteers, and come from all sectors of the tea value chain from farmers and producers through exporters, importers and traders, to educators, researchers and consultants to retailers, tea shops, hotels and tea baristas.

European Speciality Tea Association (ESTA) values the science and art of tea making at every level. We value the skill, dedication and care which has been applied to create delicate and unique hand-crafted teas which can be categorized as speciality tea.

We support the speciality tea industry in all aspects of tea production from bush to cup and recognise the farmers who are aspiring to attain excellence.

We also value the following factors which we believe help contribute to being able to distinguish speciality teas from commodity teas. These can include but are not limited to; the known supplier, the known farm, the known location, the known production dates, the known processing method.

Speciality tea can also be defined by the quality of the following five criteria; the dry leaf, the aroma of the dry leaf, the colour and clarity of the liquor, the flavour and mouthfeel of the liquor and the appearance and aroma of the wet leaf.

At ESTA we also support the use of biodegradable and environmentally friendly packaging because this is an integral part of the tea industry's future.

We believe that the consumer needs to be inspired from the moment they enjoy the aroma, liquor and taste of the tea and can celebrate in the plant's personality, the origin of the tea, the care that has been taken in the processing and brewing of it; this being a speciality moment.

European Speciality Tea Association joins in growing an inspirational community, supporting the movement which promotes speciality tea and improving the quality of tea consumed. Speciality tea exists through the dedication of people at all levels of the tea value chain. We respect and support the person plucking the leaves, the person producing the tea to the consumer brewing the tea. Each person who touches the tea until it is finally sipped can affect the final cup and our aim is to support this and share knowledge that will improve the tea industry.

European Specialty Tea Association strives to value, support and promote the people who have this dedication and who are involved and passionate in providing perfection in every cup.

We value all of the above when considering what is speciality tea and we welcome like-minded people and or affiliates to join us in our quest for tea excellence at every level.

In summary ESTA supports and promotes speciality tea (Camellia sinensis), the community and the movement. We also support the botanical sector as an inclusive part of our organisation due to its extensive synergy within the tea industry and with tea lovers and professionals.

We are a dynamic organisation, we are aspirational for speciality tea, and we aim to have a positive impact on the wellbeing of all sectors of the tea industry. We recognise the importance of collaboration and actively seek to work with and partner other organisations who share our values and mission.

The speciality tea market in Europe is difficult to measure because historically there has been no agreed definition of speciality tea, although in 2021 the European Speciality Tea association tried to put that right by issuing its own definition. However we know that it is still only a small part of the overall tea market, perhaps no more than 5% by volume and 10% by value, especially in the larger consuming countries of Russia, UK and Ireland. There is a very healthy growth, however, in speciality tea community, culture and consumption in the three aforementioned markets as well as Germany, France, Denmark and Italy amongst others. In Russia, for instance, there is a very healthy tea counter culture typified by experimentation and innovation, whilst in the UK the quickly expanding traditional afternoon tea market is turning more and more to speciality and other quality teas to enhance the consumer experience, and coffee shops are beginning to understand the importance of the tea barista as well as the coffee barista. The French love for fine food and sophisticated cuisine is being adopted by tea consumers and in Italy the 'slow tea movement' is mirroring the well- established slow food movement. Throughout Europe eastern coffee ceremony is slowly becoming more popular. A summary of the speciality tea market in Europe would not be complete without mention of the eighty European tea farms spread across many countries, most of them small but all by definition growing speciality tea, mainly for consumption in their own country.

AMERICA

美洲

莎楠. 韦伯

莎楠. 韦伯是加拿大茶叶与花草茶协会（THAC）主席。在此之前，她作为企业家在茶叶行业工作了 18 年。作为一家特色茶叶公司的创始人，以及茶叶学校和加拿大茶叶与花草茶协会董事会的董事，她对茶叶业务都有不同角度的独到见解。她是 THAC 著名的 TeaSommelier® 项目的发起人，也是消费者和行业培育的重要推动者。无论是在加拿大还是其他地区，她都十分重视茶业各个环节所带来的多样性并且始终着眼于行业大局。莎楠毕业于多伦多大学，获政治学荣誉学位，此外她还持有心理学专业研究生学历。

# 加拿大茶叶市场
## ——进口、趋势和机遇

### 一、进口

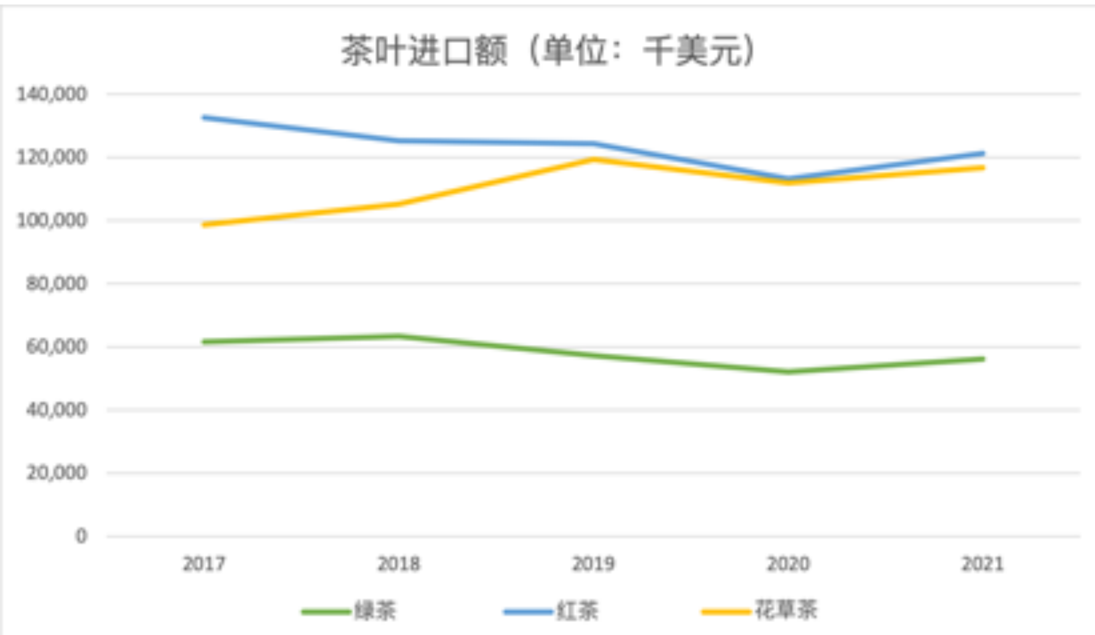
总体来看，与 2019 年相比，加拿大的茶叶销售增长强劲。由于疫情，全国实施封锁，茶叶销量大幅增长。国内消费增长 18%，比其他消费品的平均涨幅高出 7%，实现了健康增长。尽管 2020 年餐饮服务业完全亏损，但茶叶销售仍实现了 4% 的净增长。

茶让人感觉良好、平静是消费增长的主要原因。加拿大茶叶与花草茶协会在 2020 的一项调查中评估了消费者在新冠疫情期间对茶叶消费的态度，发现超过 50% 的受访者增加了茶叶消费，因为喝茶让他们感到舒适和放松。

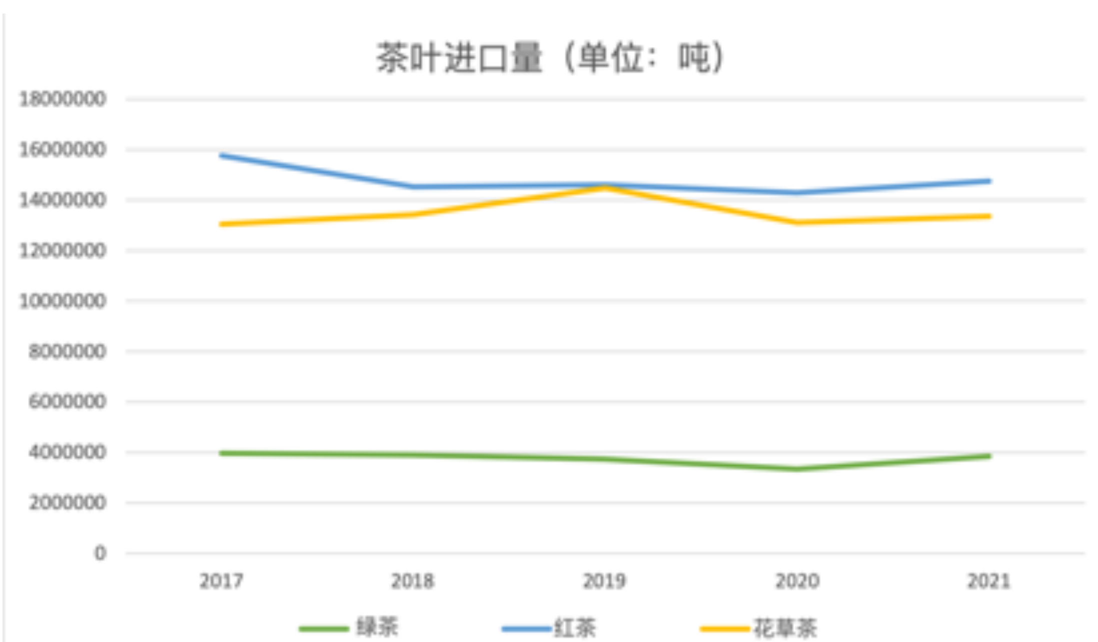

来源：加拿大茶叶与花草茶协会（THAC）调查——2020 年第 39 周消费者小组

2022 年，尽管面临商品成本、生产、包装、运输和当地劳动力成本增加等因素，但与疫情前相比，对消费品的消费依然强劲。经济学家认为价格将成为 2022 年增长的驱动因素。但我们应该考虑到市场价值的增加不一定代表销量的增加。随着国家解除疫情封锁，人们外出活动增加，将导致外出和旅途消费的增加，但通胀环境将使消费者考虑商品的性价比。

如表一和表二所示，加拿大的茶叶进口继续保持平稳，没有剧烈增长或下降。

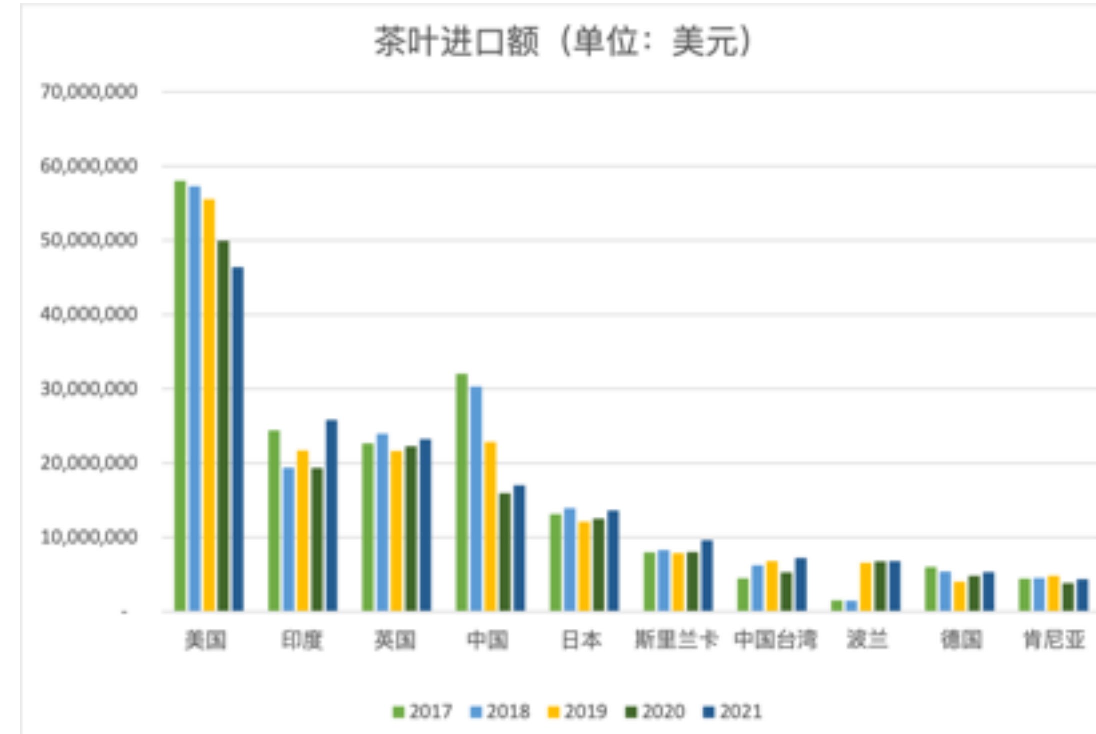



表一 来源：加拿大统计局




表二 来源：加拿大统计局

重要提示：要理解加拿大茶叶进口的总体情况，关键要看茶叶的进口来源。与其他非生产国不同，加拿大很少有茶叶在国内包装出售。表三显示了加拿大的第一大茶叶进口国—美国，和第三大茶叶进口国—英国这两个非生产国的进口数据。在过去五年中，从美国的茶叶进口量在下降，而从印度和斯里兰卡等生产国的进口在增加。




表三 资料来源：加拿大统计局

## 二、消费趋势

### 1. 自我护理

在疫情之前，消费者愈发重视自我护理。新冠疫情爆发后，那些对自我护理持怀疑态度的人也参与了进来。随着越来越多各年龄段的消费者更加重视健康，茶叶将在这一转变中发挥重要作用。过去一年，64% 的消费者表示他们越来越关注饮食对个人整体健康和免疫力的影响 。这种变化让消费者对自身健康的关注更加全面。

作为一个大类消费品，茶的增长势头强劲，热茶是增长最快的十大饮料之一。然而，我们发现这样的增长是因为茶的种类和口味繁多。这种趋势显然与代际相关。65 岁以上的人更喜欢传统的红茶，65 岁以下消费者的选择则更广泛。我们关注的重点不应该集中在一个群体。婴儿潮一代（1965 年之前出生的一代人）的消费能力仍然强劲且稳定，但他们是当今最被低估的消费群体。而下一代茶叶消费者——X 一代（60-70 年代出生的一代人），与千禧一代不同，他们有自己的观点和价值取向。

功能性拼配茶市场在疫情前后都在蓬勃发展，它们包括传统茶叶和富含维生素的花草茶，而且后者可以让这一细分市场继续增长。2021 年，全球推出的 33% 的花草茶和 23% 的传统茶有功能声明。除此之外，消费者也称他们愿意为添加维生素或矿物质的茶支付更高的价格，因此这一市场的机会非常广阔。

人们对健康的追求也反映在即饮饮料中，这类产品往往被冠以不健康的帽子，而减糖和创新可以为该品类提供翻身的机会。去年全球推出的即饮饮

料中，无糖饮料占 5%，这清楚地表明消费者需要更好、更健康的产品。在即饮饮料市场中，创新为王。消费者对冷泡茶、气泡茶、非酒精饮料的兴趣也为改茶类提供了更多机会。

除了富含维生素的茶，“适应原”也是加拿大消费者中的流行词汇。这些成分可以帮助身体更好地应对身体或精神压力。消费者在日益关注健康和自我护理的同时，对适应原的兴趣也日益增长。

**2. 社会关怀**

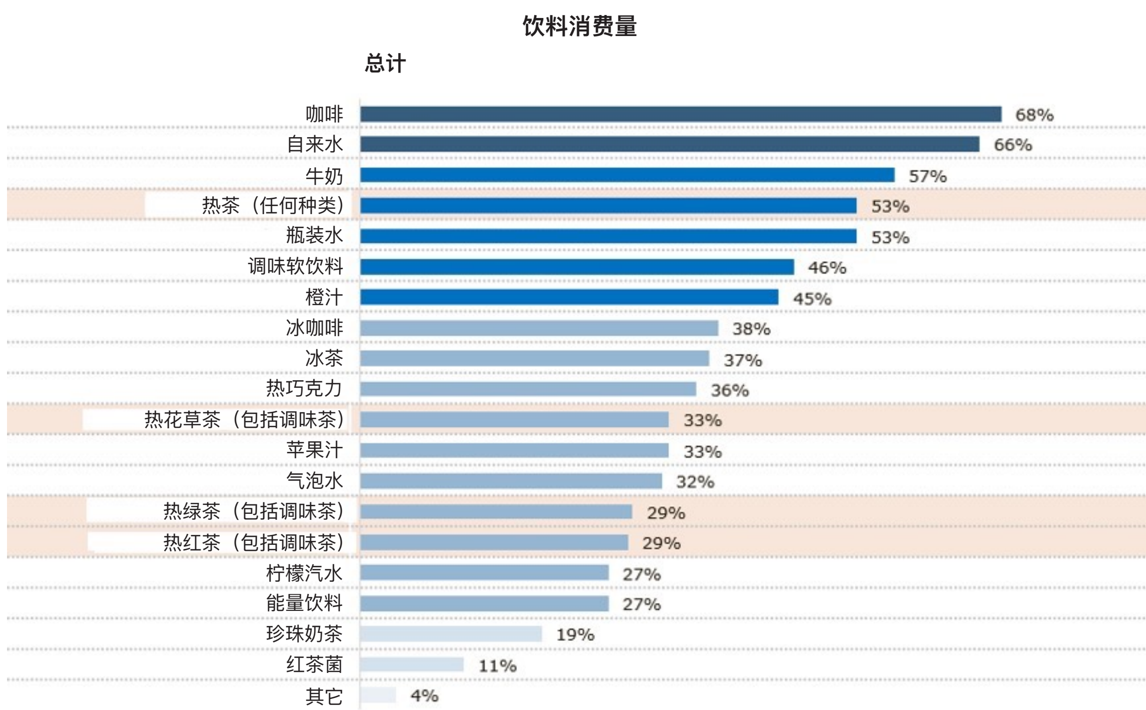
居家隔离让消费者们产生反思，不仅要关心自己，还要关心他们生活的世界。在 2021 年联合国气候变化大会（COP26）上，行业和世界领导人以及科学家呼吁各国政府采取协调一致的行动应对气候变化，改善地球的未来。这是由全球的消费者推动的。在加拿大德勤公司的一项调查中，四分之三的受访者表示，如果食品企业具有可持续性或道德规范，他们就更愿意去购买其商品。但可持续性不能仅仅是口头承诺，消费者能够获取的信息越来越多，他们有机会了解食品价值链背后的事情。人们越来越期望品牌和食品零售商坦率地说明产品的产地和制造流程。如果仅仅停留在口头层面，再加上缺乏透明度，消费者可能会转而选择他们认为更值得信赖的其他品牌或产品。

对于茶产业而言，为了适应消费者的这种行为趋势，我们需要制定明确的政策和计划去解决环境责任、碳减排和生产中的道德问题。明确的政策即要求茶产业从“我关心市场”转变为“我关心消费者”。这种以目的为导向的商业活动对于建立信任和促使消费者选择茶而不是其他饮料至关重要。为了建立信任和忠诚度，茶可以讲述引发自豪感的故事，并朝着符合消费者期望的方向发展。

**3. 消费增长**

实现市场增长可以通过以下两种方式：第一，增加现有饮茶者的消费；第二，将非饮茶者转变为饮茶者。第二种方式要求我们避免“回声室效应”，提出我们未曾提出的问题。

2021 年底，加拿大茶叶与花草茶协会采访了年龄在 18 至 34 岁的消费者，调查他们喝什么、为什么喝和怎样选择饮料。我们发现 53% 的人有日常喝茶的习惯（表四）。




表四：加拿大茶叶与花草茶协会 2021 年研究报告

这其中包括花草茶、绿茶和红茶。至于怎样选择饮料，他们强调味道是选择的关键，这是个好消息。坏消息是，当我们问到另外 47% 的受访者不喝茶的原因时，多数答案是，“茶不如其他饮料有趣”。

茶产业创新是应对这些趋势的关键。茶的种类和口味比市场上任何其他饮料都多，“不如其他饮料有趣”绝不应该成为消费者不喝茶的理由。茶叶营销的最后一次重大创新还是 1908 年袋泡茶的发明。学习与下一代消费者交流、加入他们活跃的社交平台对于促进茶叶消费是至关重要的。

同样重要的是，要了解不同年龄段消费者的不同需求，不能只关注一部分年龄段的消费者。如此前所述，婴儿潮一代（1965 年之前出生的一代人）是最被忽视的人群。然而，他们的消费能力仍然很高且稳定。他们非常重视饮食中对功能性食品的需求，注重健康饮食和个人保健。他们也没有那么害怕新技术。新冠肺炎疫情让这个群体跨越了数字鸿沟，在线购物和社交媒体早已进入了他们的生活。

在线购物和社交媒体的兴起不仅是加拿大市场的主要趋势，也是全球市场的主要趋势。2021 年，近 5 亿新用户加入了社交媒体，全球用户总数达到了 46.2 亿。到 2021 年，全球近 60% 的互联网用户每周都会在网上购物 。这就要求茶产业拥抱未来，不断创新。

**4. 结论**

在加拿大，茶叶销售仍然继续保持稳定。随着人们逐渐关心自我护理和社会关怀，茶产业发展将面临诸多发展机遇。要想满足消费者的需求，就要不断适应多方面的发展趋势，比如将茶作为一种具有多种口味的健康饮料进行营销。行业创新会吸引年轻消费者，而强调健康和幸福感将吸引老年消费者。产业的真实性和透明度需要整个供应链作出承诺，如果做好这一点，茶产业将大放异彩。

德勤加拿大：矛盾的消费者
加拿大茶叶与花草茶协会 2021 年消费者调查
HootSuite 网站 2022 年趋势报告

*Shabnam Weber is President of the Tea and Herbal Association of Canada. Prior to her current position, she spent eighteen years in the tea business as an entrepreneur. As owner of a specialty tea company, a tea school and a Director on the Board of the Tea and Herbal Association of Canada, she has a unique perspective on multiple angles of the tea business. She is the author of THAC's well known and recognized Tea Sommelier® program and a big driver in both consumer and industry education. Shabnam values the diversity offered by all parts of the tea industry, both in Canada and beyond and focuses always on the bigger picture. Shabnam is a graduate of the University of Toronto with an Honours degree in Political Science and she also holds a post-graduate diploma in Psychology.*

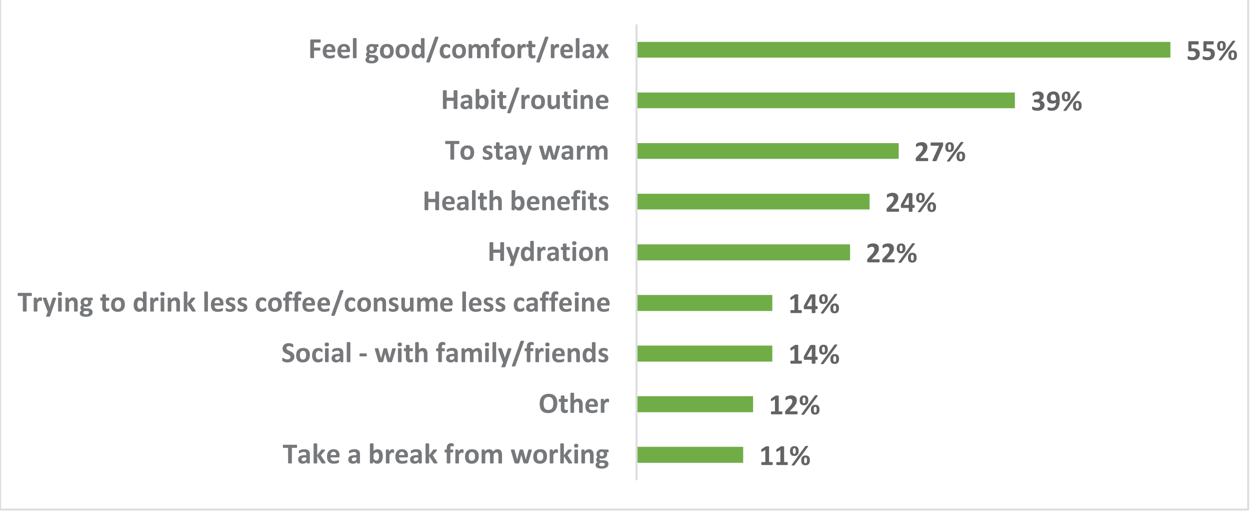
***Shabnam Weber***

# Canadian Tea Market
# – Imports, Trends and Opportunities

## I. Imports

Overall, tea sales in Canada have been strong compared to 2019. We saw a sharp uplift due to lockdowns throughout the country. In home consumption increased by 18%; a healthy rise which was 7 points above the average increase for other consumer products. And despite the complete loss of food service business, tea sales still benefited from a net 4-point gain in 2020.

This was driven largely by consumers' association of tea with feeling good and calm. The Tea and Herbal Association of Canada commissioned a survey in 2020 to assess consumer attitudes to their tea consumption during COVID and found that more than 50% of respondents said they had increased their tea consumption because it made them feel comforted and relaxed.




*Source: THAC Research – consumer panel 39th week of 2020.*

Fast forward to 2022 and despite the combination of an increase in cost of commodities, production, packaging, transportation and local labour, consumer products consumption remains strong compared to pre-pandemic levels. Economists are strongly speculating that price will be the driving factor in growth for 2022. We should expect an increase in market value which may not necessarily correspond with a boost in volumes. As countries open, increased mobility will lead to a rise in out of home and on the go consumption. But an inflationary environment will have consumers looking for value in the products they purchase.

Tea imports in Canada continue a steady and even path, no dramatic fluctuations in either direction, as reflected in Charts I and II.

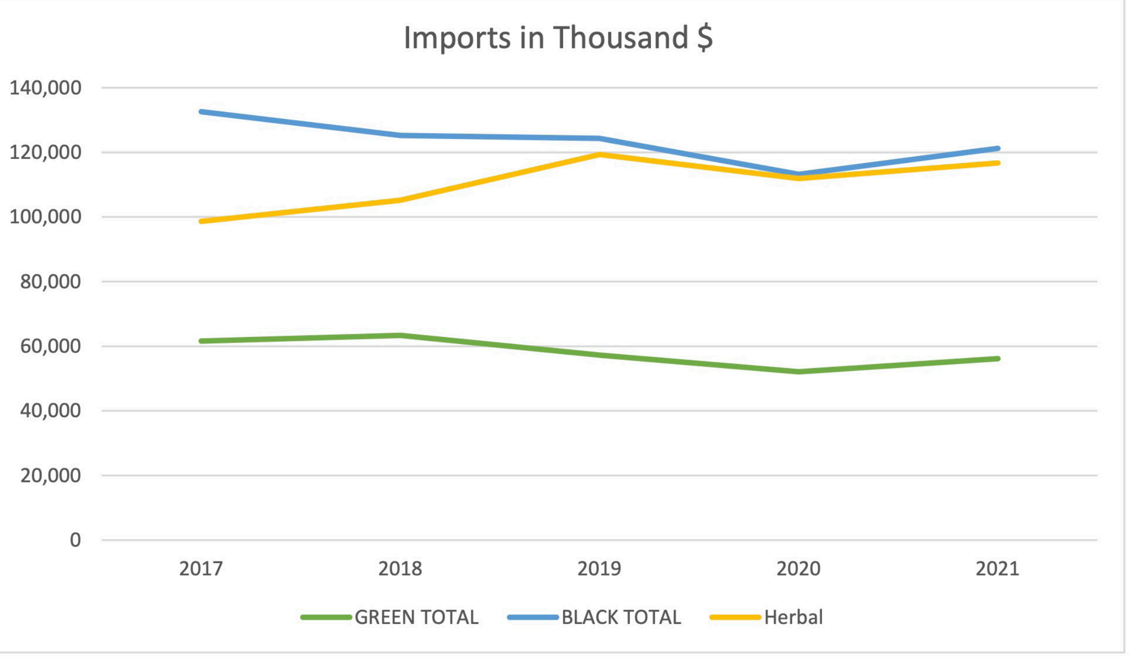



*Chart I: Source: Stats Canada*

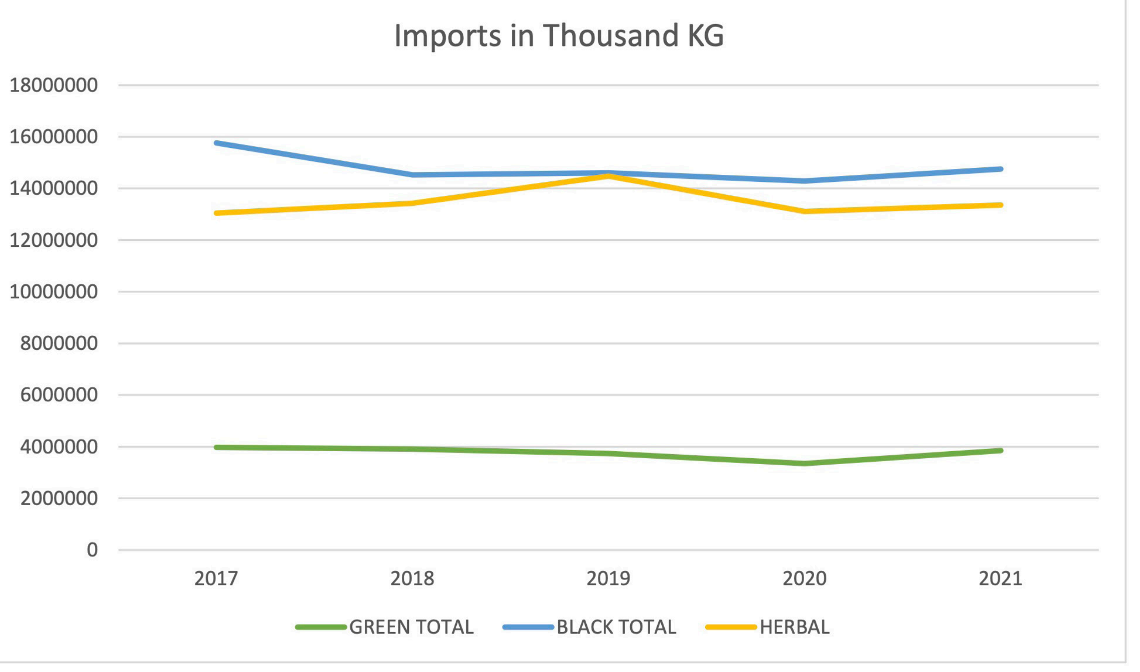



*Chart II: Source: Stats Canada*

Important note: in order to understand the landscape of Canadian tea import, where tea is imported from is key. Unlike other non-producing countries, very little tea is packed for sale within the country. Chart III illustrates the number one and number three importing countries as the United States and the United Kingdom, both non-producers. We are seeing in the past five years, a decline in imports from the United States in favour of increased imports from producing countries such as India and Sri Lanka.

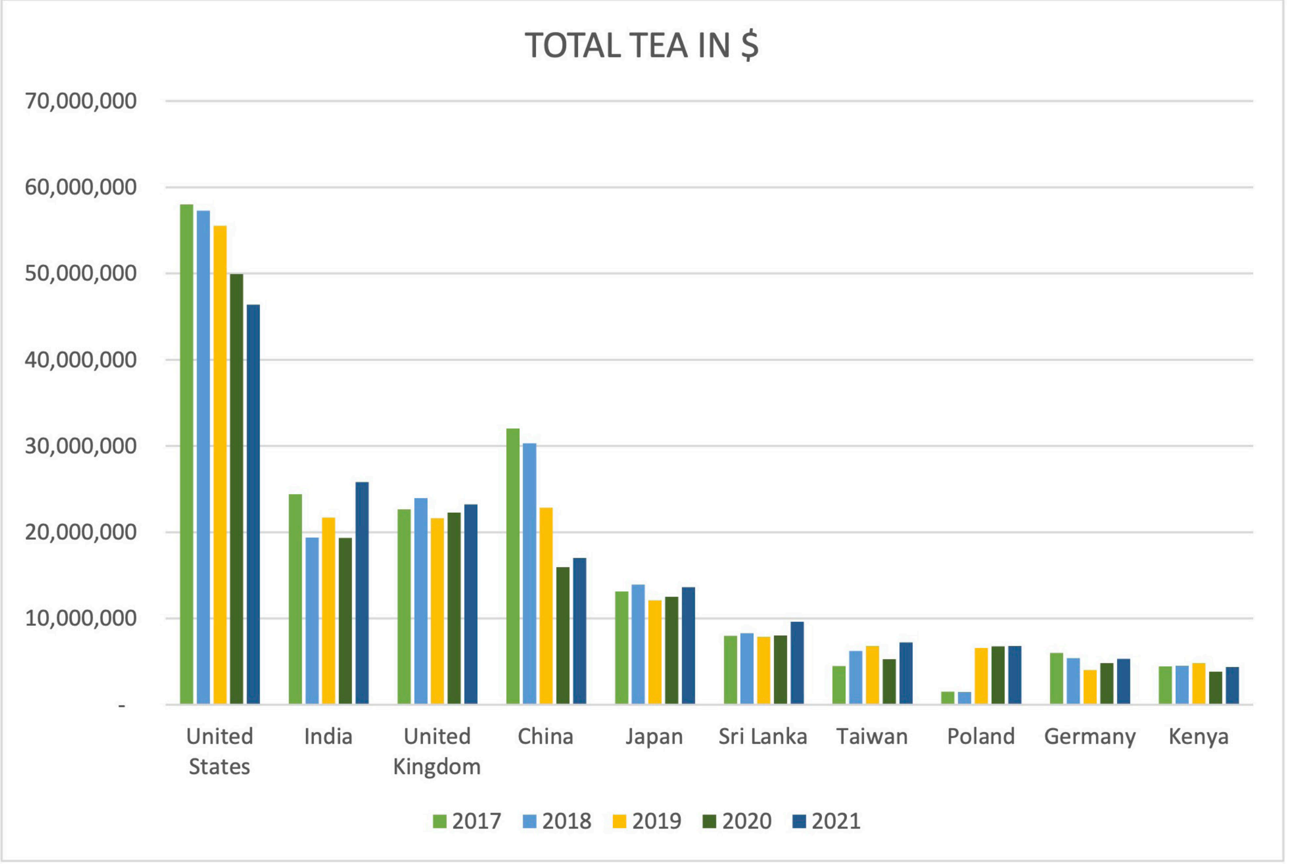



*Chart III: Source: Stats Canada*

## II. Consumer Trends

### i. SELF CARE

Prior to the pandemic, we were seeing an increase in consumer self-care behaviours. However, COVID-19 pushed even those who were skeptics to become engaged. With more consumers across all demographics engaging in a broad range of categories to take better care of themselves, the stage is set for tea to play a significant role in this evolution. In the past year, 64% of consumers say they've grown more interested in how their diets affect their overall health and immunity.[i] This evolution has consumers taking a much more holistic approach to their own well-being.

Tea in general is a strong category, hot tea being one of the fastest growing top 10 beverages. We see that trends in consumption however lie in variety – variety in types of teas and variety of flavours. These trends are clearly drawn along generational lines. Those over 65 preferring their traditional black teas and those under 65 looking for broad choices. Focus should not be on one category or the other. Boomers are in fact the most under marketed demographic today and yet their spending power remains strong and stable. And the next generation of tea drinkers – Generation X or Generation Next, are not simply Millennial 2.0, they have their own perspectives and their own values.

Functional blends were on an increase pre-pandemic and continue to boom. These include teas and herbals with vitamin-enriched formulations which could take the segment to a new level. 33% of herbals and 23% of traditional teas launched globally featured a functional claim in 2021.[ii] Added to consumers saying they would pay more for a tea with added vitamins/minerals and the opportunities are rife.

The well-being trend should be reflected on by the RTD (ready-to-drink) sector which suffers from an unhealthy image. Sugar reduction as well as innovation could provide the category opportunities.Unsweetened beverages accounted for 5% of global RTD tea launched last year and are a clear sign consumers demand better, healthier products. Within RTD, innovation will be king. The interest in cold brew, sparkling, non-alcoholic beverages are further opportunities for the tea category.

In addition to teas enriched with vitamins, 'adaptogens' are the buzzword with Canadians. These are ingredients that can help the body better cope with physical or mental stress. The rising interest in adaptogens is fully in line with consumers' increased focus on well being and self care.

### ii. SOCIETAL CARE

Being confined home has caused consumers to reflect not only on caring for themselves, but also caring for the world they live in. At the 2021 UN Climate Change Conference (COP26), industry and world leaders,along with scientists, called on governments around the world to agree on coordinated action to tackle climate change essential to Earth's future. This message is driven by consumers around the globe. Three quarters of Canadians across all demographics surveyed by Deloitte Canada indicated they prefer to shop at food retailers that have strong sustainability or ethical practices. And telling consumers you are sustainable simply isn't enough. Not in an environment where the growing availability of information is giving consumers the opportunity to peer behind the curtain of the food value chain. There is an increasing expectation for brands and food retailers to be forthright about where their product comes from and how it's made. This, and a lack of transparency, can send consumers to choose other brands or products where they feel their trust is better placed.

For tea, trends in consumer behaviour require policies and plans which clearly address the issues of environmental responsibility, carbon reduction and ethical production. Clear policies that require tea to shift from 'market to me' to 'matter to me'. This purpose driven business practise is critical to building trust and nudging consumers to choose tea over other beverages. To build trust and loyalty, tea can tell the stories we're proud of and move towards aligning with consumer expectations.

### iii. GROWING CONSUMPTION

Market growth can happen in one of two ways; first, increasing tea consumption amongst existing tea drinkers and second, converting non-tea drinkers into tea drinkers. The latter option requires us to push outside the echo chamber we largely operate in and ask questions we don't always ask.

THAC did that at the end of 2021, speaking to consumers between the ages of 18-34 to determine what they were drinking, why they were drinking it and how they made their beverage choices. We found that 53% were already consuming tea on a regular basis, (Chart IV).

This includes herbal, green and black tea, with an emphasis on flavour being key to how choices are being made when selecting a beverage. This was the good news for the tea category. The bad news, when we asked the 47% who don't drink tea why, the number one answer was, "it isn't as interesting as other beverages".[iii]

Finding ways to innovate within the tea industry will be key to address these trends. With more variety in types and flavour than any other beverage on the market, 'not as interesting as

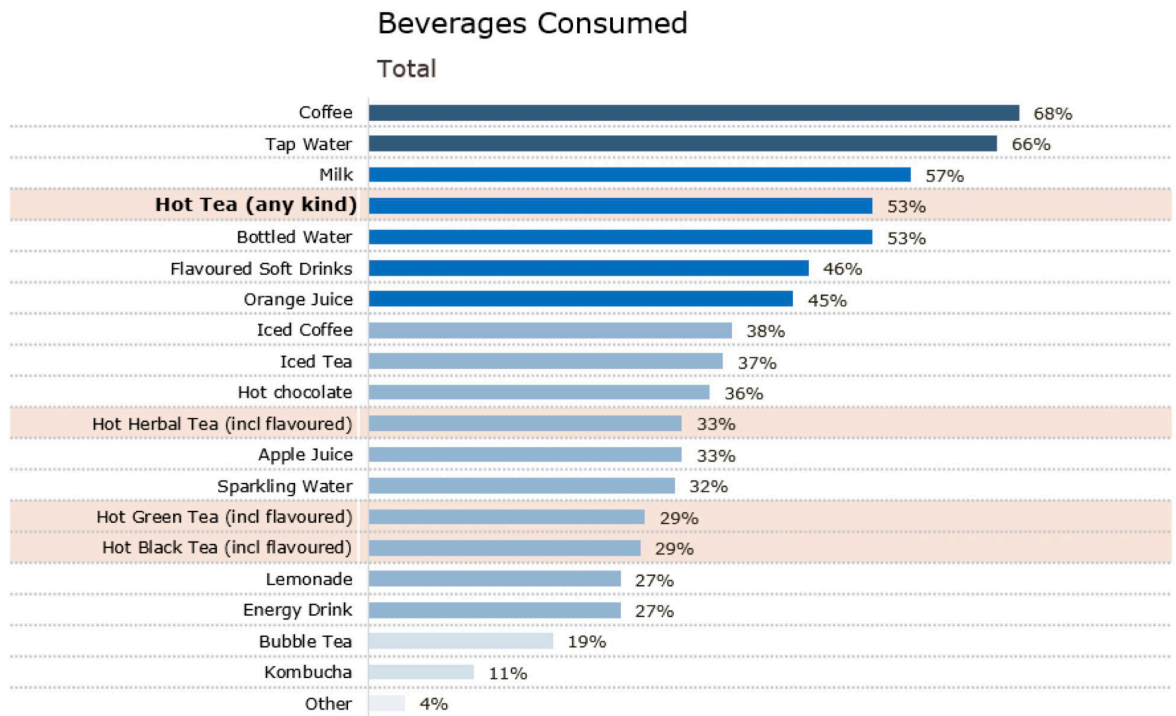



*Chart IV: THAC research 2021*

other beverages' should never be a reason for consumers not to drink tea. The last great innovation in tea marketing was in 1908 when the teabag was invented. Learning to communicate with the next generation of consumers in a language they respond to and on platforms they care about are critical for the growth of tea.

It is important as well to remember that different generations have different needs. And a focus on only one segment of the population is a mistake. As mentioned above, Boomers (those born before 1965) are the most under-targeted demographic. And yet their spending power remains high and stable. They place great emphasis and are driving the need for functional foods in their diet. Their priorities focus on healthy eating and personal wellness. They are also no longer technophobes. COVID pushed this group across the digital divide and online shopping as well as social media are very much a part of their lives.

A global shift to online shopping and a rise in social media are key trends not only in the Canadian market,but the global one too. Nearly half a billion new users joined social media in 2021 bringing the world total to 4.62 billion. And almost 60% of internet users across the globe bought something online every single week in 2021.[iv] These are trends on multi levels which will require tea to look forward and embrace innovation.

**iv. CONCLUSION**

Tea continues to enjoy steady sales in Canada. With trends towards self and societal care, the opportunities for tea are abundant. Addressing the trends on multiple fronts will be important to take advantage of what consumers are demanding. Marketing tea as a healthy beverage with a wide variety of flavours will serve the industry well. Innovation in the industry will make tea more appealing to younger consumers and emphasising health and wellness will address what is important to an older demographic. Authenticity and transparency will require a genuine commitment from the entire supply chain but done properly, tea is poised to shine.

i Deloitte Canada: The Conflicted Consumer
ii Mintel GNPD
iii THAC custom survey 2021
iv HootSuite 2022 Trend Report





彼得·高吉

他的职业生涯始于联合利华，在 Royal Estates Tea Co 子公司 - 立顿茶业公司工作了 30 多年。彼得是 T.J. 立顿和联合利华历史上第一位在美国出生的茶叶品鉴师，也曾登上过历史频道的《现代奇迹》这栏节目。

他在联合利华负责研究、规划、生产、采购等工作，并最终担任商品采购部总监，为全美的分公司采购了超过 13 亿美元的原料。

2011 年，他在工作了 32 年之后从联合利华退休，加入美国茶叶协会，并担任美国茶叶协会、美国茶叶委员会、美国特种茶研究所主席一职。彼得调整并实施了这几个组织的战略规划；继续推动茶叶委员会“茶叶与健康”理念的传播；执行了特种茶研究所的发展蓝图；指导美国茶产业的发展。他是粮农组织国际政府茶叶工作组的美国代表，并担任伦敦 2021 年茶叶贸易晚宴主旨演讲嘉宾。

在面对当前的疫情挑战时，全球各地的茶叶行业都面临诸多问题，他在继续加深对这些问题的沟通和理解。随着全球茶叶行业逐渐摆脱疫情阴霾，他认为茶叶的天然性，美味和健康特性会将其置于优势地位。

彼得毕业于纽约州立大学科特兰分校，获得化学理学士学位，辅修音乐（声乐表演），后来在 Seton Hall 大学获得国际商务证书，获得市场营销 MBA 学位。

# 美国茶叶行业现状
## ——回顾 2021，展望 2022

2021 年一整年，疫情仍然经常占据着新闻头条，比如戴口罩政策、疫苗供应、加强剂、德尔塔变体、奥密克戎变体、疫苗接种证明、旅行限制。无论发生什么，似乎都与疫情有关。实际上，尽管疫情很可怕，带来了诸多影响，但除此之外还发生了更多的事情。我们只需要拉开帷幕，看看后台发生了些什么。

就茶而言，疫情带来的影响是祸福参半。

总体而言，茶叶市场在 2021 年有所增长。从 2021 年的茶叶进口数据来看，茶叶进口总量增长超过 8.5%，其中，红茶进口同比增长 9.5%。茶叶协会在 2021 年赞助的一项定性研究报告称，消费者在疫情困难时期转而求助于喝茶，这种趋势已持续到 2021 年。人们认为喝茶有助于在焦虑时期解压和关注自我。茶富含类黄酮，对人体有多种益处，人们一直将之视为健康植物饮品，现在它的好处又多了一些。因 2020 年和 2021 年发表的几篇新研究论文已经说明了茶能够增强人体免疫系统。数以千计已发表的科学期刊仍在继续证明茶叶对人类健康产生积极影响的能力，无论是干扰癌症机制、增强心脏健康、减缓神经衰退、体重管理和预防糖尿病或改善骨骼健康，最后增强免疫功能。有益于心理健康是茶叶的部分魅力之一。茶对你有好处，味道还很棒！

受到疫情影响，餐饮服务市场遭到了毁灭性打击。随之而来的居家令、禁止堂食和保持社交距离

的要求让人们无法去最喜欢的餐厅、熟食店和便利店。整个餐厅、酒店以及航空业，不仅把人们限制在了家附近，而且是他们家里。据估计，2020 年的收入损失在 50%-70% 之间。幸运的是，随着疫苗接种率的提高，国内旅行的恢复以及联邦和州政府放宽了限制，该行业在 2021 年开始恢复。然而，在美国的一些地区，放宽限制仍是一个刚提出来或者终止的提案。

得益于送货上门和家庭茶叶消费的持续增长，特种茶消费量额齐增。虽然千禧一代和 Z 世代在茶叶消费上一路领先，但茶叶不同的产地，类型和的口味仍吸引着各个群体的消费者去买茶。茶叶引起了人们对风土、口味、产地，茶树到品牌和可持续性的兴趣，特别是对这些质量高、价格较高的茶叶。手工茶仍然备受关注，并继续快速增长。消费者越来越关注他们所购买的茶，希望能够了解更多的信息，比如产地、采摘方式、加工方式、以及茶叶如何维持制茶之人的生计、茶叶产品的环保性等，尤其是特种茶买家，他们想知道自己的钱将是对种植者，茶叶工人和“品牌”的支持，是对他们生产出优质产品的奖励。

即饮茶类（RTD）也还不断发展。据估计，2021 年即饮茶消费量增长 3%-4%，销售额增长 5%-6%，但它面临的挑战仍很明显，其他品类的竞争，例如，健康性、提神补水等方面就会制约即饮茶的创新以及继续提高销量和销售额的能力。尽管按照每一份的量来算，即饮茶要比袋装茶更贵，但是消费者还是继续购买即饮茶，因为它们方便快捷，能替代含糖饮料，更为健康。创新、丰富的口味以及健康定位是继续增长的几大关键因素。

传统茶（杂货店 /DMM（药店 / 大型零售商）努力保持 2020 年的收益。茶包销售额在 2020 年增长了约 18%，保持这种扩张是大多数公司在整个 2021 年关注的焦点。通过传统媒体和社交媒体与消费者沟通的水平远高于前几年，这表明了利润的改善和对品牌再投资的需求。随着餐饮服务行业的扩张和户外消费的增加，保持收益的压力是显而易见的。所有部门的人均消费量都有所增加，传统供应商正在努力保持前进的步伐。

此外，消费者似乎真正接受了在家泡茶的方式。众所周知，无论是用家庭做法，还是用水壶或随便一个马克杯，一个人泡茶本身就会使人平静和放松。此外，茶还拥有帮助人体进入放松的精神状态的自然能力，增强内部安宁，这种状态在过去的一年中很重要。

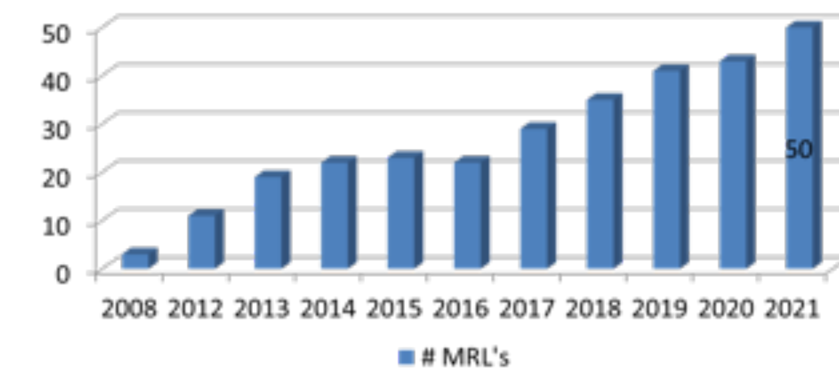
78% 的注册营养师认为消费者的饮食习惯已经发生改变，以前是一日三餐，现在人们吃快餐的频次增加。此外，由于消费者对健康、福祉、经济下行的焦虑，营养师们预计 2021 年人们消费的两大驱动力是具有下列特点的食物和饮料：①增强免疫力；②物美价廉；③增强舒适感和情绪健康（幸福感）。

虽然茶叶消费总体上是积极的，但疫情迫使公司和供应链采取不同的工作方式。我们逐渐摆脱封闭的过程也造成了航运失衡，库存也随之下降。船被困在海上，而港口则努力将货物转移到拖车上交付给客户。海运公司肆意抬高运费，某些出口地区，特别是亚洲 FEU(40 尺集装箱 ) 的成本从 3,000 美元上涨到 17,000 美元。此外，集装箱数量失衡延缓了恢复的速度。当时的情况很糟糕，联邦海事委员会 (FMC)，甚至是拜登总统都在试图让供应链恢复到正常状态。我们参与了货运联盟集团，有助于我们向政府和海事机构决策者们施压，并让他们注意要代表消费者行事。

作为特朗普总统政府的遗留问题，在拜登领导下的美国仍在对中国茶叶征收关税。我们仍然主张取消对中国茶叶征收关税，尽管到目前为止，拜登政府似乎并没有打算取消这些关税。

2021 年，我们仍在努力增加茶叶中的可残留项，美国环保署 (EPA) 设定了 3 个新的可残留项。美国茶叶协会继续代表行业顺利推动这项工作，下图是迄今为止，我们取得的成功。

**茶叶农残项**




作为行业代表，美国茶协仍在华盛顿传达我们在关税领域、标签（原产国和营养）和膳食指南、港口拥堵问题方面的立场。令人激动的是，我们已于 2022 年 4 月举办了第六届国际茶与人体健康科学研讨会。这种支持还体现在各个领域，涉及诸如重金属；HTIS 分类和修改；Prop65 法令；可持续性问题和茶包中的纳米塑料。可持续发展仍然是消费者、客户和行业供应链的重要驱动力。我们通过各种努力与加拿大茶叶与花草茶协会以及英国茶叶委员会进行沟通联通，确保跨境信息的凝聚力。

作为一个行业，我们面临着继续教育消费者区别茶与草药以及其他植物的艰巨任务，因为这几种东西的 AOX( 可吸附有机卤化物 ) 或整体健康属性并不同。我们针对各种形式的茶在社交媒体上传递的信息都在强调“真正的茶”的好处，茶企应该进一步加强这类信息传递。

茶的种植面积在美国继续扩大，既响应了本地种植和从“农场到餐桌”趋势的号召，也为种植者提供了替代的可持续性作物。任何以美国为基地供应主流茶叶市场的想法至少还需要几十年的时间。然而，如果利润率变得足够诱人，那可能会引入更多的资源，并且同比销售量的增速也会越来越快。

在国际上，原产国仍在通过地理名称和商标来保护和宣传其茶叶独特的风土。采用类似葡萄酒的产区营销和保护有助于将一个地区与另一个地区区分开来，并主动向消费者传达地理环境，海拔和气候作为茶叶质量关键要素的好处。

**市场增长：**

我们每年都会尝试估计各类茶叶市场的规模和增长。我们通过一些定量验证得出了许多估值。此外，我们注意到 2021 年食品通胀的 CPI 为 3.9%。以下这些数字仅供参考。

| | 1990 | 2018 | 2019 | 2020 | 2021 估计 |
|---|---|---|---|---|---|
| 传统市场（超市，药店和大型综合市场） | 0.87 | 2.33 | 2.26 | 2.67 | 2.51 |
| 即饮饮料 | 0.20 | 6.20 | 6.14 | 6.45 | 6.70 |
| 餐饮业 | 0.50 | 1.55 | 1.59 | 0.80 | 0.96 |
| 特种茶 | 0.27 | 2.58 | 2.68 | 3.20 | 3.30 |
| **总销售额** | **1.84** | **12.66** | **12.67** | **13.12** | **13.47** |

（单位：十亿美元）

2021 年 Pollock Communications 和 Today's Dietitian 的“营养趋势”调查中，有 1165 名注册营养师（RDN）做出回应，该调查让我们深入了解到在营养师眼中疫情是如何改变消费者的饮食的。

## 2022 预测

茶不仅在 2021 年获得了发展，而且它直击那些驱动因素的核心，即有益于免疫系统、方便现成、物有所值、稳定情绪。茶将继续成为 2022 年的人们最喜爱的产品之一。此外，与营养师和营养学家一样，美国医疗健康信息平台 WebMD 连续把茶叶列入十大提供超级健康保护的食品。

• 所有部门的茶都会继续增长。

• 全叶茶、特种茶 - 全叶茶和天然风味茶在各类消费者群体中的受欢迎程度不断上升，尤其是在千禧一代中。那些寻找产品背后故事的人会探查到茶叶背后丰富的历史、风土、传统。

## 疫情会继续使“茶的力量”备受关注

根据美国薛顿贺尔大学（Seton Hall University）定性调查显示，茶叶有助于心血管健康、增强免疫力、改善心情等功效，这也是人们喝茶最常见的原因。2022 年，我们已经委托了一项新的研究，这样我们就能继续观察千禧一代和 Z 世代是如何看待茶的。

红茶—正在从绿茶健康光环的阴影中浮现，它拥有一下健康特性：

心血管健康

身体健康

免疫系统增强

解渴 / 充饥

提神醒脑

绿茶—绿茶在持续吸引消费者兴趣。美国消费者对这种有益健康的饮品赞赏有加，特别是对下列功效：

情绪 / 心理健康

缓解身体不适（喉咙痛 / 胃痛）

解压

• 餐饮业会继续保持平稳增长，逐渐回复到疫情之前的状态。

• 消费者会继续喝茶，茶叶消费量会创新高并保持下去，这有助于增加杂货店 /DMM 的销量，抵抗住销量的下降（与疫情期间相比）。

• 即饮饮料会继续增长，增幅不会很大。

• 随着茶叶种植“产区”的独特产品越来越广为人知，特种茶的消费量和额都会继续上涨。

## 面临的挑战

**1、可持续性**

美国茶叶协会认为可持续发展需要三管齐下：

a. 生态可持续性

b. 社会可持续性

c. 经济可持续性

我认为，茶本身已经显示出了很强的生态可持续性，需要采取行动的是后两者。经济可持续性是最大的威胁。总的来说，生产商和小农并没有赚钱。自上世纪 50 年代以来，如果考虑通货膨胀因素，茶叶的实际价格一直没有变化过。这使得原产地工人被边缘化，产生不可持续的经济模式，影响了人们维持城镇和村庄社会结构的手段。同时，大型零售商嘴上说着可持续性，但它们并没有提高店铺里茶产品的价格，生产商也无法获得合理的利润。现在我们应该向零售商施压，确保供应链中的每一个参与者都能从他们的工作中获得公平的价值。

**2、供需问题**

茶叶供应会继续大于需求。历史已经证明如果茶叶价格上涨，生产商就会乘势加大产量。通过跳过修剪周期或增加茶叶采摘长度，他们能立即增产 20%。供应量增加，质量降低的后果就是价格下滑。如何摆脱这种关系是企业维持长期生存的关键。解决办法只有两个：提高消费或减少生产，但是要注意这些解决方案并不具有排他性，而且应该同时进行。

**3、自由无限制的贸易**

国际贸易正在对整个供应链造成更大的挑战。我们都看到了全球航运供应链的影响，港口集装箱堆积，运费上涨，卡车和卡车司机短缺以及原产地空集装箱位置错放。我们还看到海运承运人和港口利用这种混乱来为自己谋利，并将成本提高到几乎不合情理的水平。此外，贸易壁垒仍然存在，例如：

a. 农作物化学残留标准不统一

b. 政治 vs. 以科学为基础的监管决策 ( 例如草甘膦问题 )

c. 原产国标签

d. 关税

为了全面恢复经济增长和稳定，自由贸易是我们必须拥有的一个基本组成部分。我们的行业必须共同努力，妥善解决这些问题。

我仍然对未来保持坚定的乐观态度。茶可以提供给消费者很多东西。茶叶的供应链是有弹性的；生产者通常希望生产出好的产品，而消费者则希望获得良好的价值。正如我去年所说，我们茶叶界需要与消费者设定期望，还要强烈要求为供应链中的所有人提供公平的回报，并继续宣传茶对世界和人体健康的益处。

*Peter began his career at Unilever and spent over 30 years working with Lipton Tea as part of Royal Estates Tea Co. Peter was the first American-born Tea Taster in the history of T.J. Lipton/Unilever and was featured on The History Channel's Modern Marvels.*

*His career at Unilever included Research, Planning, Manufacturing, Procurement and his final position was Director of Commodities Procurement, sourcing over $1.3B of raw materials for all operating companies in the Americas.*

*In 2011, Peter retired from Unilever after 32 years and joined the Tea Association. As President of the Tea Association, Tea Council and Specialty Tea Institute, Peter has implemented and updated their Strategic Plans; has continued to drive the Tea & Health message of the Tea Council; executed the growth agenda for the Specialty Tea Institute; and helped to guide the Tea Industry on its path to growth. He serves as the U.S. representative on FAO's International Governmental Group for Tea and will be the keynote speaker at 2021's Tea Trade Dinner in London later this year.*

*Currently faced with the challenges of COVID-19, Peter continues to drive communication and understanding of the multiple issues faced by the Tea Industry: locally, regionally and internationally. As the global tea business emerges from this pandemic, Peter believes that tea will be in a position of strength, leveraging its naturalness, great taste and healthful properties*

*Peter graduated from SUNY Cortland with a BSc. in Chemistry and a minor in Music (vocal performance), later earning his MBA in Marketing with a Certificate in International Business from Seton Hall University.*

***Peter F. Goggi***

# State of the U.S. Tea Industry
## Review of 2021 and a Look Forward into 2022

2021 continued with COVID as the prevailing headline and it stayed that way throughout the year. Whether it was masking policies, availability of vaccinations, booster, Delta variant, Omicron variant, proof of vaccination, travel restrictions well you get it!

No matter what happened, everything seemed to revolve around COVID. In reality, so much more was happening albeit influenced by this horrible pandemic. We just need to part the curtain and see what happened backstage.

As far as tea was concerned, the pandemic was a mixed blessing.

Overall, the tea market grew in 2021. In reviewing tea import figures for the year, total tea imports are up over8.5%, with Black Tea exceeding 2020 by more than 9.5%. As reported last year, a qualitative study sponsored by the Tea Association reported that consumers turned to tea during those difficult times. This trend continued in2021. Tea's perception as being an enabler for de-stressing as well providing a feeling of "centeredness" during these anxious times. This complements tea's perception as a plant-based, healthful drink, consumed for its variety of benefits, rooted in its high flavonoid content. In fact, several new research papers were published in 2020 and2021 illustrating tea's extraordinary ability to act as a booster of human immune systems.

Further, consumers seem to truly embrace the entire process of brewing tea in their home. It is known that personal"tea ceremonies" whether using a family recipe or a "mom's" kettle or a certain mug, in and of itself calms and relaxes. This coupled with tea's natural ability to induce a "relaxed but ready" mental state, heightens the feeling of serenity and internal quiet, mental states that were at a premium during this past year.

And as we know, mental health is only part of tea's attraction. Literally thousands of published scientific journals continue to document tea's ability to positively impact human health. Whether potentially interfering with cancer mechanisms, enhancing heart health, slowing neurological decline, positively impacting weight management and preventing diabetes or improving bone health and lastly boosting immune functionality, tea is good for you and tastes great!

While tea consumption generally benefited positively, COVID impacted businesses, forcing different ways of working in companies and supply chains.

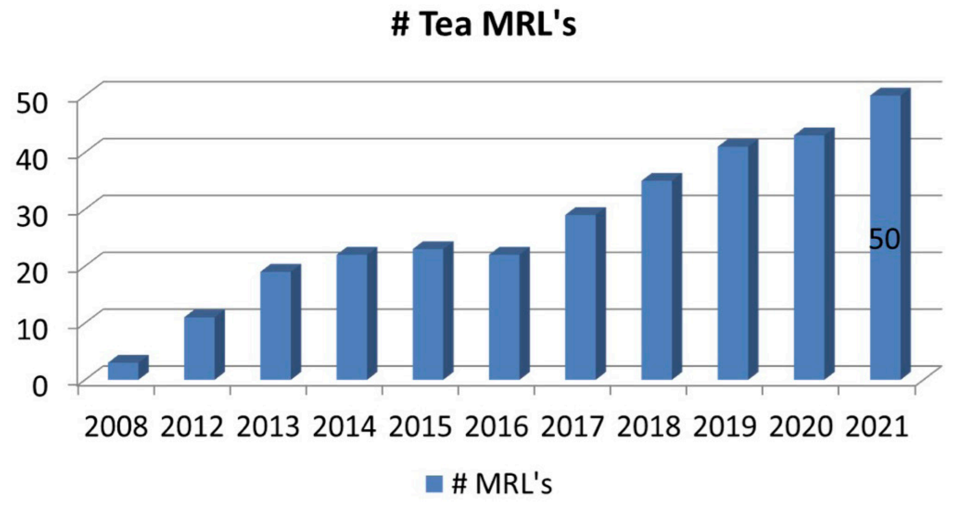
Inventory declines were one of the results of the shipping imbalances caused by our emergence from isolation.

Container vessels were stuck offshore while ports struggled to move cargo onto trailers for delivery to customers.

Ocean freight companies raised rates to unconscionable levels with some export regions, particularly Asia, seeing the cost of a FEU going from $3,000 to $17,000. Further a container imbalance prevented a faster recovery. The situation was so dire, that the FMC and even President Biden got involved in an attempt to get supply chains backto some semblance of normalcy. Our participation in a Freight Coalition consortium assisted us in helping to apply pressure and notice to key players in the government and maritime bureaucracies to act on consumers behalf.

Tariffs on tea from China continued as a holdover from President Trump's administration and continues under President Biden. We continue to advocate for removal of this tariff on Chinese tea, although to date, there seems to be no interest in removing them by this Administration.

Our efforts to increase the number of tea tolerances continued in 2021 with an additional 3 new tolerances established by EPA. The Tea Association continues to successfully drive this initiative on behalf of the industry,leading to our successes to date as indicated in the following chart.



Our work in Washington D.C. continued with the Tea Association communicating its positions on behalf of the industry in the areas of tariffs, labeling (country of origin and nutritional), Dietary Guidelines and port congestion issues. Even more exciting is that we will be hosting the 6th International Scientific Symposium on Tea & Human Health in 2022.

Support and defense of the industry is our mission. This support is seen in a variety of areas, addressing such topics as heavy metals; HTIS classifications and modifications; Prop 65 actions; sustainability issues and nano-plastics in tea bags. Sustainability continues to be an important driver for consumers, customers and industry supply chains. In all efforts we attempt to ensure cohesive messaging across borders by liaising with the Tea &Herbal Association of Canada and the UK Tea & Infusions Association.

### Foodservice Improves; Specialty Tea continues growth; RTD growth slows; Traditional/Grocery works to hold on to previous gains

2020 proved devastating to the foodservice market which was hugely impacted by COVID. The accompanying stay-at-home orders, prohibition of indoor dining and social distancing requirements kept people far away from their favorite restaurants, deli's and convenience stores. The entire restaurant, hotel and event categories of

businesses, along with the airline industry, kept people, not only close to home, but IN their homes. It is estimated that in 2020 loss of revenues was somewhere between 50% - 70%. Fortunately, this sector began to come back in2021 as vaccination rates increased, domestic travel resumed and federal and state governments eased

restrictions. However, in some parts of the country, this continues to be a start/stop proposition;

Specialty Tea continues its rise in both pounds and dollars, bolstered by continued growth with in-home delivery and in-home consumption of tea. While Millennials and Gen Z's led the way, consumers across all demographics continued to consume tea for its variety of origins, types and flavors. Tea generates interest in terroirs, flavors,origins, bush to brand and sustainability, particularly in these high quality, higher priced teas. Artisanal teas remain of high interest and continue to grow at a fast clip. Consumers are becoming more engaged with their teas and want to learn more and more about where their teas come from; how they are harvested and manufactured;

how the product supports the livelihoods of those making it; and, how friendly the product is to the environment.

Specialty tea buyers, in particular, seek to engage with their products of choice. They want to know that the dollars they spend are going to support the grower, tea workers and the "brand" as a reward for a job well done in manufacturing quality products.

Ready-to-drink (RTD) tea category continued its growth. Estimates are that 2021 exhibited circa 3%- 4% growth in volume and 5% - 6% in dollars. Challenges for RTD remain clear: competition across other categories, e.g., health,refreshment and hydration, will challenge this category's ability to innovate and compete in order to continue volume and dollar growth. While more expensive than bagged tea on a per-serving basis, consumers continue to reach for RTD teas for their flexibility, convenience and as a healthier alternative to sugary beverages. We continue to see separation and segmentation between premium, high quality RTD's and the value, CSD replacement segment. Innovation, flavor variety and healthful positioning will continue to be legs of growth.

Traditional tea (Grocery/DMM (Drug/Mass Merchandisers) fought hard to maintain the gains from 2020. Tea bag sales grew some 18% in 2020 and preserving that expansion was a focus of most companies throughout 2021.

Communication to consumers through traditional media and social media was at a much higher level than previous years that speaks to the improved bottom lines and need for re-investment in brands. As the foodservice sector expanded and out of home consumption increased, pressure on keeping gains was clear. Increased per capita consumption occurred across all sectors and Traditional purveyors are working hard to keep their progress.

As an industry, we are challenged to continue educating the consumer in the difference between true teas(Camellia sinensis) from herbals and other botanicals, neither of which have the same level of AOX or overall Healthful qualities. Our messaging across all forms of tea through our social media initiatives highlight the benefits of "true tea" and should be amplified by all tea companies.

The cultivation of Camellia sinensis continues to expand in the U.S., serving both to answer the call of locally grown and farm-to-table trends as well as providing alternate, sustainable crops for growers. It is still very early days and any thought of a U.S. based tea supply for mainstream teas is at least several decades away. However, if margins become attractive enough, more resources may be brought to bear and faster YOY volume gains could be seen.

Internationally, producer countries of origin continue to protect and advertise their teas through geographic designations and by trademarking their unique terroirs. The adoption of wine-like appellation marketing and protection serves to differentiate one region from another as well as proactively communicating to the consumer the benefits of geography, elevation and climate as key ingredients to tea quality.

### Market Growth:

Each year we try to estimate the size and growth of the various tea markets. We derive many of these estimates qualitatively with some quantitative validation. Further, we note that CPI for food inflation in 2021 was 3.9%.

Please use these figures only as a guide.

| | 1990 | 2018 | 2019 | 2020 | 2021 Est. |
|---|---|---|---|---|---|
| Traditional Market (Supermarket, Drug and Mass Merchandisers) | $0.87 Billion | $2.33 Billion | $2.26 Billion | $2.67 Billion | $2.51 Billion |
| R-T-D | 0.20 " | 6.20 " | 6.14 " | 6.45 " | 6.70 " |
| Foodservice | 0.50 " | 1.55 " | 1.59 " | .80 " | .96 " |
| Specialty Segment | 0.27 " | 2.58 " | 2.68 " | 3.20 " | 3.30 " |
| Total Sales | **$1.84 Billion** | **12.66 Billion** | **12.67 Billion** | **13.12 Billion** | **13.47 Billion** |

The 2021 Pollock Communications and Today's Dietitian "What's Trending in Nutrition" survey, with 1,165 registered dietitian nutritionists (RDNs) responding, provided an in-depth look at how dietitians believe consumers'diets have changed due to COVID-19.

### COVID-19 Transformed the Way Consumers Eat and View Food

As a result of the pandemic, 78% of RDNs believe that consumer eating habits are shifting away from the traditional 3 meals a day to more frequent snacking. In addition, with anxiety about health, wellness and the challenging economy looming in consumers' minds, RDNs predict the top purchase drivers of 2021 will be foods and beverages that:

1.Support immunity
2.Are affordable and value-based
3.Promote comfort and emotional well-being

Tea not only benefited from COVID in 2021, it hits the bullseye of these drivers by being beneficial to our immune system; readily available and of good value; and an enabler in achieving emotional well-being. Tea will continue to be one of the go-to products in 2022.

Further, WebMD continues to list tea as one of its 10 Superfoods offering Super Health Protection as do Dictitians and Nutritionists.

**2022 Predictions:**

• Tea Will continue to grow across all sectors.

• Whole Leaf Teas/Specialty Tea - Whole leaf teas and naturally flavored teas are not only continuing to increase in popularity among consumers, especially millennials, but across all demographics. Consumers who are looking for the "story" behind their favorite products have a treasure trove of history, terroir and tradition to investigate with tea.

**COVID continues to spotlight the "Power of Tea"**

• Cardiovascular health, immune boosting properties, and improvement of mood are the most popular reasons as to why people drink tea according to a qualitative survey by Seton Hall University. A new study has been commissioned for 2022 so that we can continue to see how tea is viewed by the important Millennial and Gen Z demographics.

o Black Tea - Is beginning to emerge from under the shadow of green tea's health aura with ownable health properties

- Cardiovascular Health
- Physical Health
- Immune System Boost
- Satisfy Thirst/ Hunger
- Pick-Me Up

o Green Tea - Green tea continues to drive consumer interest. Americans appreciate this beverage for doing something good for their body, specifically:

- Emotional/ Mental Health
- Immune System Boost
- Drank when feeling sick sore throat/stomach ache
- Stress Relief
- Emotional/ Mental Health
- Immune System Boost
- Drank when feeling sick sore throat/stomach ache
- Stress Relief

• Foodservice will continue modest growth as it returns to pre-pandemic levels.

• Consumers will continue to enjoy tea and the new levels of tea consumption will be maintained, helping Grocery/DMM sales to resist declines vs. pandemic gains.

• RTD will continue to grow, albeit at lower levels.

• Specialty continues its growth in both dollars and volumes as unique offerings from tea growing "appellations" become more widely known.

**The tea market will continue to face the following challenges in 2022:**

**1.Sustainability**

The Tea Association of the U.S.A., sees sustainability as a three-pronged strategy
a. Ecological Sustainability
b. Social Sustainability
c. Economic Sustainability
The tea industry has demonstrated a strong commitment to ecological sustainability and continues on its journey for a sustainable supply chain. Economic sustainability continues to be a challenge. Producers and smallholders are generally not making money. The realized prices of tea have not moved since the1950's, when taking inflation into account. This marginalizes workers at origin and drives the industry to an unsustainable economic model, impacting the ability for tea workers to maintain the social fabric in the towns and villages where they live. Meanwhile, large retailers advertise and speak about sustainability, yet do nothing about allowing the price of the product in their stores to rise, disallowing the opportunity for the producers to realize a reasonable margin. The time is come to put pressure on retailers to ensure that EVERY player in the supply chain receives fair value for the work they do.

**2.Supply and Demand**

Supply continues to outstrip demand and history has proven that if tea prices rise, the producers will manufacture more tea to take advantage of the higher prices. Producers, by skipping pruning cycles or plucking a little further down on the bush, have an almost immediate ability to turn on a volume tap of20% more tea. The result of higher availability and poorer quality: lower prices. Escaping the clutches of this boom/bust cycle will be one of the keys to the long-term survival of the business. There are only two solutions: drive consumption or reduce production. Note that these solutions are not exclusive and should be done in tandem.

**3.Free and Unencumbered Trade**

International trade is becoming much more of a challenge to the entire supply chain. We have all seen the impact of the global shipping supply chain, the piling up of containers at the ports, increased freight rates,lack of trucks and truck drivers and poorly positioned empty containers at origin. We have also seen ocean carriers and ports use this disruption to their favor and increase costs to an almost unconscionable level.

Further, we continue to see barriers to trade through:

a. Lack of harmonization of crop chemical tolerances
b. Political vs. Science based regulatory decisions (e.g., Glyphosate)
c. Country of origin labeling
d. Tariffs
Free trade is a basic building block that we must have in order to fully return to economic growth and stability. Our industry must work together to properly address these issues.

**4.The Goodness of Tea**

The number of positive attributes regarding tea continues to be buttressed by research and demonstrates why this great product should be consumed by EVERYONE! More research continues to be published highlighting the Power of Tea. In fact, the Tea Council of the U.S.A. will be sponsoring the 6th International Scientific Symposium on Tea & Health in Q2 of 2022.

The papers presented will provide further platforms for celebrating tea's healthful properties and getting the message to consumers that consuming tea is a great way to take care of yourself, both mentally and physically.

I remain firmly optimistic going forward. Tea has so much to offer to its consumers. Tea's supply chain is resilient; producers generally want to produce good product and consumers want to receive good value.

As I stated last year, we, the tea community, need to set expectations with consumers, demand fair return for all in the supply chain and continue to shout from the rooftops about the goodness of tea, both for our world and our health.

I look forward to an exciting year......And don't forget that the 3rd International Tea Day as designated by the United

Nations will be:

**May 21st, 2021!**

# AUSTRALIA
# 澳洲

大卫 . 莱恩斯

大卫 . 莱恩斯在澳大利亚茶叶市场有着 23 年的从业经验，还是唯一一家澳洲政府注册、代表澳大利亚茶界的茶叶组织的创始总监。大卫 . 莱恩斯从行业和爱好者角度，对澳大利亚茶业都有着深刻的理解。

在最初的 25 年职业生涯中，大卫在埃斯科菲厨房系统中成功完成培训，成为一名法国古典厨师。大卫花费十年的时间创业并自主经营餐厅和餐饮业务，之后来澳大利亚看望兄弟，并同许多人一样爱上了这个国家。大卫随后携妻儿于 1996 年移民澳洲。

1997 年，大卫重返商界，向澳大利亚一些最好的餐馆、顶级酒店和时尚咖啡馆批发优质茶叶。经过十年的培育和发展，这些领头机构对精品茶产生了新的兴趣，大卫随后进入了茶叶零售业，成为当时领先的商业街茶叶零售商 -- 茶叶中心的区域经理和培训官。

2014 年，大卫发现澳大利亚民众和酒店业成员期望接受更多的茶叶教育。由此，专业的茶叶培训和咨询公司 18thirtyfour 应运而生。大卫今天仍旧从事着这项业务，在澳大利亚一些广受学术界赞誉的机构进行演讲，包括蓝山国际酒店管理学院（托伦斯大学集团成员）、澳大利亚国立大学 ANU 和新南威尔士大学 UNSW，以及代表公司和企业进行演讲，包括过去四年在澳大利亚最大的茶叶活动—悉尼 & 墨尔本茶叶节上的演讲。

由于具备澳大利亚茶业从业背景，大卫因此考虑成立一家代表业内人士的组织，从业者或爱好者均可参加。2015 年开始探讨组织成立事宜，2016 年年中澳大利亚首家注册非营利慈善茶叶组织就此成立。

澳大利亚茶文化研究会 (AUSTCS) 代表澳大利亚茶叶界的贸易和爱好者。该组织每年都在不同的地点举办年度研讨会 - 澳大利亚茶文化研讨会。这个年度活动是一个公开讨论平台，起到塑造澳大利亚茶叶行业未来的作用，人们还有机会听到世界各地茶叶行业专业人士的演讲。

2016 年，在首次访问中国后，大卫受邀成为中国国际茶文化协会的名誉会员，这家位于杭州的协会广受赞誉。大卫收到邀请时很谦虚，他为能够代表澳大利亚感到骄傲，同时也非常认真地对待所肩负的会员责任。

当被问及对茶叶的热爱时，大卫总会提及对茶叶历史和文化的热爱。他相信，研究过去不仅可以使他能洞悉澳大利亚茶业的未来，还能窥见全球茶叶行业未来的发展趋势。

## 2021 年澳大利亚茶叶行业报告

**在灾难时期，人类似乎有一种潜能来展现每个人性格中最好和最坏的一面。2021 年，这些性格特征几乎出现在我们世界的任何地方！**

2020 年，全世界都在忙于应对全球疫情的余波。我们的日常生活发生了翻天覆地的变化，我们不得不在奔跑中思考，为了安全而隔离，每天都要应对疲劳、疾病和死亡。

2021 年，澳大利亚的许多居民开始质疑限制性隔离政策，就连制定并推动这些政策的国家、州和地方政府工作人员也在质疑其必要性。对个人、社区和企业实施的长期隔离和封锁政策导致了民众中开始出现沮丧、乏味、恼怒等情绪，企业的信心也

开始下降。民众中出现自私的情绪，并逐渐蔓延到孤立和随机的暴力事件、哄抬物价、充满个人主义色彩的“我想要的就一定要有”的态度和行动中。人们不再考虑集体利益。

在澳大利亚，像墨尔本这样的城市正在打破各种恶名纪录，被公认为是全球封锁天数最多的城市之一。一些受影响的产业几乎被消耗殆尽，比如高街购物、酒店、现场音乐会和艺术产业等。部分商家已经关闭，许多面临财务困难，有些甚至已经破产清算。

但在这么多沮丧情绪的一年里，澳大利亚的茶产业却积极创新，建立社群，并成为人们常谈的话题——茶给人带来好的感觉！

下面是我对 2021 年澳大利亚茶产业的报告。

图片由荒井庄园和澳大利亚茶文化协会提供

## 2021 年澳大利亚的茶产业

如果你仅通过媒体认识澳大利亚的茶产业，你一定会认为新冠肺炎疫情为茶产业创造了一个全新的“黄金时代”。澳大利亚 2021 年的茶叶销售额预计将超过 12 亿美元。根据目前的澳大利亚人口数据，这大概相当于人均 48 美元。根据这些数据，澳大利亚 2025 年的茶叶销售额预计将进一步增长 5%。

但是，如果我们更深入地研究数据，我们能否看到澳大利亚茶叶和花草茶市场的真实情况?

在第四届国际茶业年会组委会编写的《全球茶情报告（2021 年 5 月）》中，我发表了一篇报告，指出人们所谓的“茶”是一种范围广泛的饮料，它的原料不仅只山茶树叶，还包括草药、水果和浓缩茶甘露或粉末（用于即饮茶）等。因此广义上茶产业的现状并不代表细分市场的现状。

大量澳大利亚民众认为的“茶”包含以上多种产品，这让人们在谈到“茶”时容易产生歧义。这甚至可以反映在公司生产的数据中，有些公司将被称为草药茶（草药或水果的浸泡液）的饮料归类到茶叶中。像路易波士茶这种草药茶会给普通消费者造成极大的困惑，甚至在茶叶行业中，许多人将路易波士茶描述为来自南非的红茶。

我还要再次强调，人们对不属于传统分类的茶越来越感兴趣，我在 2020 年的澳大利亚产业报告中提到过这些茶。像珍珠奶茶这样的茶，以及被用作鸡尾酒和无酒精鸡尾酒原料的冷泡茶，包括柑橘茶、碳酸茶饮料和冰茶，在澳大利亚正在急剧增加。社交媒体上的网络红人喜欢拍摄消费这些时尚茶的时刻。墨尔本的两名年轻女性最近发起了澳大利亚最大的众筹活动，帮助他们的创业项目“珍珠奶茶俱乐部”，一家正在发展壮大的居家自制珍珠奶茶公司。澳大利亚的社会活跃者们蜂拥而至，他们的众筹请求在互联网上铺天盖地，远远超出了女孩们的预期。这只是新茶理念如何为澳大利亚茶市场带来创新的一个例子。

另一个例子是“茶吧”的出现。与茶馆或咖啡馆相反，茶吧面向的是有艺术鉴赏力、有社会意识的消费者群体。他们为了时尚，爱喝以茶制成的鸡尾酒或无酒精鸡尾酒，或者抱着相同的目的，喝以古代茶道制作的高端传统茶。无论是悉尼的 Ms. Cattea 茶吧还是墨尔本的幽玄茶吧，都正在成为一种“喝茶”新潮流。我相信这种新的、时尚的茶饮服务将缓慢而稳定地发展，且必然会影响高端酒店和餐厅重新考虑他们的茶饮服务。

当然，在过去的一年半里，消费者也一直在购买“良好的感觉”。人们对茶的印象往往是一种健康、温暖、舒适的热饮，这也是我们在讨论为何消费者在这个困难时期喜欢购买茶的重要因素。这种温暖而模糊的印象非常适合茶产业，我稍后将谈到这一点。

2021 年底，澳大利亚储备银行发布报告显示，澳大利亚达到了前所未有的个人储蓄水平，再加上前所未有的低息融资，导致澳大利亚经济数据极为扭曲。这些现成资金和金融模式导致了全新的购买习惯，例如人们在疫情封锁前夕去超市疯狂抢购卫生纸等商品，这在疫情封锁前是很滑稽的举动。

不幸的是，茶叶，特别是茶包也成为恐慌性购买的商品之一。当超市货架上的茶类被抢购一空后，像卫生纸一样，人们这时才意识到自己买了过多的茶叶。一些人试图向超市退货，但超市在他们在询问时就拒绝了。


图片由悉尼 Ms. Cattea 茶吧提供

图片由墨尔本幽玄茶吧提供

这种恐慌性购买问题可能会对许多商品的供需产生长期影响。如果人们在家中储存大量商品，商家未来的销售可能会受到影响。厂商的生产模式可能会陷入混乱，整个供应链的上下游一致性也会被打乱。

另一个问题是供应链中断，这导致进口到澳大利亚的商品锐减。

当我们讨论这个问题时，我们会立即想到进口到澳大利亚的茶叶。供应链确实是一个问题，但由于疫情影响了全世界的航运，因此在 2020 年，物流才是更大的问题。2021 年，尽管没有恢复到疫情前的水平，但全球物流看上去略有恢复。

澳大利亚茶叶物流运输面临的问题，就像世界各地的许多问题一样，在没有明显理由的情况下导致运输成本急剧增加。这一问题在最近的一次国际

会议上被提出，我的英国同事 James Pogson 在会上对各国政府进行了分类，以调查航运成本急剧上升背后的原因。

在研究物流成本和恐慌性购买的同时，我们也需要考虑影响澳大利亚茶产业的其他因素。总部位于新南威尔士州北部的马都拉茶业（Madura Tea）在封锁前的几波恐慌行抢购期间，为了供应消费者对茶包的需求而手足无措。马都拉茶业董事 Gary Davey 告诉《堪培拉时报》，他们的茶叶和茶包的需求增加了 90%。你可能觉得这是件好事，但是当你的茶包标签来自西班牙，连接标签和茶包的挂绳来自德国时，就会出现问题。

马都拉茶业在耗尽了库存的标签和挂绳后，向世界各地寻求临时供应商，但没有得到任何回复。马都拉茶业只好在没有标签或绳子的茶包盒中放置了一张“给客户的信”解释此事。这个例子表明，全世界都是紧密相连的，供应链中的一次中断或消费者的抢购可能会减慢整个机器的速度，甚至会长期损害公司业务。

另一家位于昆士兰的茶叶公司内拉达茶业（Nerada Tea）在 2021 年初推出了一款全新品牌。他们的新品牌在这种时机理所当然地进入了市场，但这种利用恐慌性购买使商品进入消费者家庭的方式可能不太合理。我认为他们需要耐下心来等待一段时间的市场反馈，而不是在动荡的时期投机取巧。

澳大利亚还有一个问题，我之前肯定提到过，就是新居家创业的茶叶企业的不可持续性。这些新的基于互联网的茶叶企业的创业速度绝对是不可持续的，因为澳大利亚地广人稀。少量关于茶叶的可靠数据表明，澳大利亚大约一半的人口饮茶。这意味着在人口略低于 2,500 万的情况下，大约有 1,250 万澳大利亚人饮用广义上的“茶”。数据公司报告显示，澳大利亚茶叶市场平均每年增长 3.5%。

这种增速无法支持在过去两年里出现的这些几乎是家庭手工业式的小型企业。这些企业的创始人是那些被困在家里、无法在公共场所工作、很少有机会外出的人，他们四处寻找机会，以填补他们生活中的空白，而他们的动机常常是因为无聊。他们可以轻松购买茶叶、制作调味茶、混合草药茶或水果茶，而出于爱好的居家互联网创业听起来非常有吸引力。除此之外，通过定期邮寄或快递服务轻松分发茶叶，以及茶叶在邮寄过程中损坏或变质的可能性极小，使其更具吸引力。这种创业方式如此简单，甚至可以说人人都可以做到！

这种小型的个人爱好者茶叶企业的涌入对茶叶质量和专业茶叶零售商产生了重大影响，无论是线上还是线下零售业务。少数潜在购茶者以及他们愿意或能够花在茶叶上的价格被分散在更多的零售商中，创造了许多业务不可持续的小企业。澳大利亚的茶产业与咖啡产业一直在竞争，而这一现象不利于茶产业的一致性。

我对这一现象的另一个担忧是，关于茶的专业知识可能会失传。随着那些老牌企业的倒闭，很多在该行业工作多年并拥有丰富制茶知识的人才也随之流失。从长远来看，这让我感到担忧，因为我最近经常得到错误的饮茶建议和信息！

我现在 60 多岁，正在思考日常生活中许多方面的变化。其中一个方面是对心理健康的认识和讨论。

在我的一生中，我见证了心理健康从一个没人谈论的禁忌话题变成今天成为日常谈话内容的转变，并且人们在日常生活的许多领域都开展了对心理健康的宣传。

目前，在澳大利亚，我们似乎正面临着心理健康领域流行病一样的的巨大浪潮。心理行业从业者、医生、健康顾问从未像现在这样被病人包围，他们来自各个年龄段、地区和社会阶层，所有群体都毫无例外地受到心理疾病的影响。澳大利亚的自残和自杀率正在飞快上升。

你可能会问：“这和茶有什么关系？”

在 2020 年底和 2021 年初，几家企业高管组成的团队齐心协力，筹集了接近 750 万美元的启动基金，帮助澳大利亚媒体业成立了一家名为 Unltd 的公司。这家独特的公司作为一个社会目的组织，其使命是减少澳大利亚青少年自杀的数量。Unltd 认识到心理问题是澳大利亚年轻人的头号杀手，并着手改变这一事实。

这时候就要提到我之前所说的“良好的感觉”了。通过制作、品尝甚至分享茶叶，创造这种心理健康领域上“良好的感觉”。他们成立了“Mood Tea”，一个有助于提高青少年防范自杀意识的网络社区，旨在帮助减少年轻人日益严重的自杀问题。

他们出售茶树茶和草药茶，拥有令人难以置信的媒体影响力，获得了数百万人的关注。他们使用诸如“拯救生命，从喝茶做起”，“只有茶懂你”之类的标语，最近还推出了一部用电影制作风格的广告《无私啜饮》。

“Mood Tea”可能会对澳大利亚青年、社区和茶叶行业产生深刻且积极的影响。让我们一起拭目以待吧！

https://www.mood.org

## 结论

2021 年，澳大利亚错过了举办悉尼和墨尔本茶叶节活动的机会，与澳大利亚的其他活动相比，错过这两场最大、最受欢迎的茶叶活动是一个巨大的损失。再加上全国和各州的封锁以及供应链问题，你可以想像这种遍布全国的消极情绪。

所幸在 2021 年，创新主导了澳大利亚的茶产业，广义的“茶”的消费量上升了，大约一半的澳大利亚人口都在消费茶。我们感受到了这种积极的信号！

澳大利亚全国公认的茶社区机构——澳大利亚茶文化协会继续在全国各地社区推广饮茶和茶文化。他们将继续通过教育、社区展示（包括面对面形式和虚拟形式）以及信息媒体来实现。在 2021 年，澳大利亚茶文化协会通过在社区范围内推广“澳大利亚国际茶日茶会”，继续让公众树立“国际茶日”的意识。通过或简单或高雅的茶会活动，让所有澳大利亚人都有机会参加进来。受疫情影响，2021 年澳大利亚茶文化研讨会不得不再次以网络形式举行，但仍然取得了巨大的成功。澳大利亚茶文化协会将继续尝试与澳大利亚政府和各州政府建立合作并寻找资助机会。这包括在澳大利亚创建一个合法的、全国范围的茶叶信息数据库。

我期待着 2022 年新冠肺炎疫情下人们的生活变得正常、国家开放边境以及定期举办更多国际和全国会议、研讨会和其他活动。

图片由荒井庄园和澳大利亚茶文化协会提供

**David Lyons**

*With twenty-three years' experience in the Australian tea market, entrepreneur and founding Director of the only Australian Government registered NFP and charitable tea organisation representing the Australian tea community. David Lyons has a great understanding of tea in Australia from an industry and enthusiast perspective.*

*David spent the first twenty-five years of his working life successfully training and then practising as a classical French chef, under the Escoffier kitchen system. After a decade of starting up and operating his own restaurant, cafe and catering businesses. David visit his brother in Australia and like many fell in love with the country. He later proceeded to sell-up in the UK and then migrate to Australia with his wife and two sons in 1996.*

*By 1997, David was back in business which included wholesaling fine quality leaf teas to some of Australia's finest restaurants, premier hotels and fashionable cafes. After ten years of nurturing and developing a new interest in teas by these leading establishments, he then moved into tea retail, becoming a regional manager and training officer for then leading high street tea retailer, The Tea Centre.*

*In 2014, David identified a greater desire in Australia towards education in tea by the general public and members of the hospitality industry. This was to lead to start-up of 18ThirtyFour a specialist tea training and consultancy business. A business which David continues today, giving presentations at some of Australia's academically acclaimed establishments, including the Blue Mountains International Hospitality Management School (a member of the Torrens University group), the Australian National University – ANU and University New South Wales – UNSW. Along with corporate and private presentations including lectures over the last four years at Australia's largest tea event the Sydney & Melbourne Tea Festival's.*

*David's background in the Australian tea community, lead him to consider the formation of an organisation to represent all within that community, whether industry or enthusiast. Discussions commenced in 2015 and by mid-2016 Australia's first registered not-for-profit and charitable tea organisation was formed.*

*The Australian Tea Cultural Society (AUSTCS), represents the Australian tea community both trade and enthusiasts. Hosting its annual seminar -The Australian Tea Cultural Seminar at a different location each year. This annual event offers an opportunity for open discussion, a chance to attend national and International guest presentations given by industry professionals, and an opportunity to help sculpt the future of tea in Australia.*

*In 2016, after previous visits to China, David was invited to become an Honourable Member of the acclaimed China International Tea Cultural Institute – CITCI, Hangzhou. David humbled by the invitation proudly represents Australia and takes his member responsibilities incredibly seriously.*

*When asked to identify his passion in tea, David always turns to his love for the history and culture of tea. Believing, that while studying the past, it gives him insight into the future development of tea not only in his own country of Australia but globally.*

# 2021 Australian Tea Report

**In times of catastrophe, mankind seems to have a latent ability to bring out the best and the worst in our personalities. 2021 saw these character traits appear just about everywhere in our world!**

In 2020 the world found itself scrambling to deal with the real consequences of a global pandemic. Our everyday worlds were turned upside down and inside out, we had to think on the run, isolate to protect, deal with fatigue, illness and human loss on a daily basis.

In 2021, many within the Australian community began to question the restrictive isolation policies, even members of government both national, state, and local, who had created, and were instigating these policies were questioning their need. The prolonged quarantine and lockdown rules placed on individuals, communities, and businesses, started to show signs of frustration, boredom, irritation and reducing business confidence. Selfish attitudes appeared and even spilt over into isolated or random violent events, price gauging, individualistic 'I want, and I will have' attitudes and actions. All taken with very little thought for the cost on our communities.

In Australia, cities like Melbourne were becoming record breakers for all the wrong reasons, recognised as one of the global cities with the most amount of lockdown days. The effect on certain sectors of business was simply draining. High-street retail, hospitality, live music, and the arts, suffered. In some cases complete shutdowns and for many financial hardships and even liquidation of businesses.

But in a year of so much frustration, tea in Australia was able to create positive innovation, build community, and offer something we all talk about regularly – teas feel good factor!

This is my report on tea in Australia during 2021.

*Image courtesy of Arakai Estate & AUSTCS*

## TEA in AUSTRALIA 2021

If you read everything in the media about tea in Australia, you would believe that COVID has created an almost new 'Golden Age' in tea. It is expected that tea sales in Australia will exceed US$1,200 million in 2021. Which will equate to sales of approximately US$48.00 per person, using present Australian population figures. And, based on this data, it is expected there will be a further 5% in growth to 2025.

But, if we delve deeper into the data, can we find what's really going on in Australia in the tea and tisane market?

As I reported in the annual 'World Tea Industry Review (2021.5)', edited by the 4th Annual International Tea Conference Organising Committee. What is described as tea can cover a wide range of beverages which includes tea produced from Camellia sinensis, but also herbs, fruits, and condensed tea cordials/powders (used in some RTD teas). It doesn't always make for a clear picture of what is really going on.

Large numbers of the Australian public consider tea as coming from a varied selection of products, which can easily confuse the tea conversation. This can even be reflected in data produced by companies who blend in beverages known as tisane (herbal or fruit infusions), to their classification of tea. Herbal tisane like Rooibos can cause great confusion to the everyday consumer, with many even in the tea industry describing Rooibos as a red tea from South Africa.

I would again, also like to emphasise the increased interest in teas which do not come under the traditional classifications, teas which I mentioned in my 2020 Australian review. Teas like boba or bubble tea, cold teas including nitro-tea, carbonated teas and iced teas being used as ingredients in cocktail and mocktail creations, are dramatically increasing in Australia. The social media influencers, love to be seen consuming these fashionable styles of tea. Two young women in Melbourne recently created Australia's largest crowd-funding exercise. This was to help their new business 'Bubble Tea Club', a do it yourself at home bubble tea company to grow. Socially active Australians flocked to be involved, their request for crowdfunding went completely viral over the internet, and far exceeded the expectation of the girls. This is just one example of how new tea ideas are innovating the Australian tea market.


*Image courtesy of Arakai Estate & AUSTCS*

*Image courtesy of Yugen Tea Bar, Melbourne*

Another example is the emergence of "Tea Bars". As opposed to tea houses or cafes, tea bars aim at a decerning and socially aware customer base. The fashionable image of having a tea cocktail or mocktail or for that matter a classically served high end traditional tea. At either Ms. Cattea Tea Bar in Sydney or Yugen Tea Bar in Melbourne is becoming a very new slant on "taking tea". I believe this new, stylish form of tea hospitality will grow slowly but steadily and will most certainly influence high end hotels and restaurants to re-think about their tea service.

Certainly, during the last year and a half, consumers have also been purchasing for the "feel Good" factor. The idea of tea being a healthy, warming, feel good brew, has been a large part of many conversations around, on why people are buying tea during this difficult time. This warm fuzzy perception is great for the tea industry and is something I will comment on later.

As we approached the end of 2021 the Reserve Bank of Australia was reporting on never-before-seen personal savings levels in Australia. These savings along with the high levels of low interest finance, have created skewed data within Australia. This readily available money or finance has generated unusual purchasing patterns. An example being the frantic buying of items from supermarkets prior to a notified lockdown. People purchasing ridiculous numbers of toilet rolls, has become the almost humorous image of pre-lock-down behaviour.

Tea and in particular tea bags have unfortunately taken on a similar situation, as part of the panic buying. Shelves in supermarkets at some points have been swept clear of any tea items remaining. As with the toilet rolls, people later realise with hindsight what they have done. Some have tried to return items to supermarkets for refunds, finding themselves only to be refused when they enquire.

This issue of panic buying could have a longer-term effect on many purchasing patterns. If people have large quantities of stock stored in their homes, future sales could be damaged. Production patterns could be thrown into confusion, and consistency to the whole supply chain disrupted.

Another issue which has caused problems, has been the disruption to the supply chain as logistic companies struggled with the shipping of goods into Australia from overseas.

When we discuss this issue, we immediately think of tea being shipped into Australia. This certainly has been a problem, but the physical movement appears to have been a greater problem during 2020, as the effects of the pandemic effected global shipping. In 2021 although not back to its pre-pandemic levels, the movement of goods globally seems to have eased slightly.

These issues with the logistical movement of tea have in Australia, like for so many around the world caused dramatic increases in shipping costs with no apparent reasoning. An issue recently brought to the forefront of an international meeting, and at which my colleague James Pogson (UK) sort governments internationally to enquire into the reasoning behind the dramatic rises in shipping costs.

When looking at logistics and panic buying. We do however need to consider other factors which effect tea in Australia. Madura Tea, based in Northern New South Wales, were rushed off their feet trying to keep up with demand for their tea bags during pre-lockdown purchasing frenzies at various times. Madura director Gary Davey told The Canberra Times Newspaper, they had experienced a 90% increase in demand for their teas and tea bags. One would say a great place to be but when your tea bag tabs come from Spain and the jiggler string connecting the tab to the tea bag comes from Germany, then problems can arise.

The Australia based company completely ran out of tabs and strings, searching other parts of the world for temporary supply without any luck. Madura Tea placed a "Dear Customer" card in the boxes of tea bags which had no tab or string. This example just shows how connected we all are, but one break in a supply chain or an unprecedented purchasing pattern can slow the whole machine down or even damage your business long-term.

Another tea company, Nerada Tea based in Queensland was in the process of launching a new look branding in early 2021. Their new look certainly entered the market at a difficult time but may in some strange way, ensured their new look went into the homes of those panic buying. I suppose they will need to be patient to see the result over time and not during these turbulent times.

One issue here in Australia, which I have certainly touched on before, is the unsustainable levels of new home-based tea businesses. The rate at which these new internet-based tea businesses are opening is most definitely unsustainable, with such a small population spread over such a vast continent.

The small amount of good data on tea in Australia, suggests that approximately half the population consume tea. This means with a population of slightly under 25 million people, approximately 12.5 million Australians consume a beverage they call tea. The data companies report that the Australian tea market is growing on average by 3.5% annually.

This level of growth cannot support the many small almost cottage industry style businesses which have appeared particularly during this last two years. Those stuck at home, unable to work in their regular workplace, and very few opportunities to go out. Have found themselves looking around for opportunities, to fill the empty, mainly boring space in their lives. The ease by which people can purchase tea, create flavoured teas, blend herbal of fruit tisane and set up an online hobby business is so attractive to many. Add to this the easy distribution of teas through regular post or courier services, and the minimal possibilities of any damage or spoiling of tea on its journey, makes it even more attractive. In fact, so easy, you may even say anyone can do it!

This influx of small hobby style tea businesses is though having major effects on quality and speciality established tea retailers, whether online or main street. The small number of possible tea purchasers and the amount they are willing or able to spend on tea. Is, being spread thinly across far more retailers, creating many long-term unsustainable small businesses. Not great for consistency in a trade which is always desperately competing with Australia's infatuation with bean coffee.

Another concern I have with this influx, is the possible loss of intellectual tea-based knowledge, as those established businesses close-down and finish off. In some cases, losing tea people who have been employed in the industry for many years and have a wealth of tea knowledge. This concerns me in the long-term, having recently observed poor tea advise and information being given regularly!

Now in my early 60's, I find myself considering many changing aspects in our everyday lives. One aspect that has


*Image courtesy of mood.org*

changed enormously is the awareness and discussion around mental health or mental wellbeing.

In my life, I have seen this change from being a taboo subject not spoken about. To today, where the subject is almost a regular part of conversation, and awareness campaigns are featured in many sectors of everyday life.

In Australia at the present time, we seem to be encountering an enormous wave of almost epidemic proportions in mental health. Practitioners, doctors, health councillors have never been so inundated with patience from every age group, demographic, and heritage background, with no one group being affected any more than another. The rates of self-harm and suicide in Australia is rising to dramatic levels.

You may ask "what does this have to do with tea?"

In late 2020 and into 2021, an industry group of executives pulled together to form a starting fund of just under US$7.5 million. The Australian Media industry formed a company and named it Unltd. This new unique company, operates as a social purpose organisation, aiming to reduce the numbers of youth suicide in Australia. Recognising the number one killer of young Australians, Unltd set about changing this fact.





This is where the feel-good factor I mentioned earlier comes in, by using the mental health-giving aspects of making, sipping and in some cases sharing tea creates. They have formed Mood Tea, an online entity which helps promote awareness of youth suicide, its mission is to help reduce this ever-growing issue for young people.

They sell teas and tisane, obviously have an incredible media presence, and are becoming followed by millions. They use sayings like "saving lives, one cup of tea at a time", "teas that know just how you feel" and they recently launched their "sip selflessly", using movie production style advertising.

The effects of Mood Tea could have dramatic affects and positive consequences for Australian youth, the community, and the tea industry. Let's wait and see how it turns out!

https://www.mood.org

## Conclusion

In 2021 the Australian tea industry lost the hosting of its two largest and much-loved tea events, the Sydney, and Melbourne Tea Festivals. Compared to many other events in Australia, losing these two captivating events was a great loss. Add to this the national and state lockdowns, and supply chain issues you would imagine a sense of overwhelming negativity.

But instead, in a year when certainly innovation was a major player in the Australian tea scene, consumption of what the public see as tea went up, and around half the Australian population consume tea. We can feel very positive!

Australia's nationally recognised body for the tea community, the Australian Tea Cultural Society (AUSTCS) continued to promote tea drinking and tea culture within our community. This continues to be achieved through education, community representation including face-to-face and virtual, and informative media. AUSTCS in 2021, continued the building of awareness of International Tea Day (ITD) by promoting the community based "Australian ITD Tea Party. An opportunity for all Australians to partake in the simple act of a tea party,


*Image courtesy of AUSTCS*

no matter how simple or elegant you wish your tea party to be. The 2021 Australian Tea Cultural Seminar was once again forced to conduct a virtual event but despite this was still a great success. AUSTCS will continue to try and build relationships and investigate funding opportunities, with the Australian Government and the individual State Governments. This includes the creation of a legitimate, national based data collection of tea information in Australia.

I for one am looking forward to 2022, to some normalizing of life with COVID, the opening of boarders and the creation of regular international and national conferences, seminars, and other events.